

# VOLUNTARY CARE IN A MIXED ECONOMY OF WELFARE PRESENT TRENDS - FUTURE PROSPECTS

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## **A/ Introduction: Concepts and Definitions**

The aim of this paper is to raise a number of key questions about the role of voluntary care, in relation to present trends in the restructuring of public - private interrelations in the field of welfare. References to Greece, Eastern Europe and the E.U. highlight common trends and major differences, in an attempt to explore the potential of supranational activities in the third sector and their impact within member states.

### **A/ Definitions:**

A crucial issue is that of definition. How do we define «voluntary care»? and where do we draw the line between different forms of voluntary action in terms of its character, motives, organizational form (to name but a few)? In the wide spectrum ranging from informal individual or primary group activities, to complex organizations, formal criteria for ascribing the term «voluntary» differ between countries, as we can see from their statutory provisions. But if defining the voluntary sector for legal purposes is a complicated task, deeper divisions of socio-cultural character, as they are articulated in their historical specificity, form the basic contours of the modern landscape of citizenship.

1/ Well known scholars in this field have attempted to produce a definition, or at least to delineate the sphere of voluntary activity have enriched our understanding of the complexity and dynamics of different forms of social action, its motivation and organization. (Salamon 1992, 1993). Emphasis is often placed on questions of structure and management, and on relationships with the state and the market, couched in terms of western, industrial, gender and race specific analysis. There is, also a tendency to gloss over the negative aspects of voluntary activity, and to leave out the understanding of

power relationships, exploitation and dependency, all of which, may also form part of service provision in this sector.

So how do we define «voluntary»; and where do we draw the line in an attempt to distinguish it from expression of love and moral obligation - as in informal care within family and kinship networks - or according to contractual arrangements within a formal social policy framework? When we buy care in the market, where does the formal arrangement stop in the real process of implementing agreements? When privately employed specialists, or public employees extend their activities beyond the prescribed time and task, or work within a largely undefined, open arrangement, can we say that they move into the voluntary realm? Is unpayed overtime voluntary work? And does compensation or even some form of payment to volunteer workers turn them into non-volunteers? How important are motives as criteria for definition? Should we accept only disinterested, purely altruistic giving as voluntary, or should we acknowledge that all forms of action have motives and involve some sort of personal gain - thus placing even altruism under scrutiny?

Such questions are by no means new and have been already addressed by scholars and practitioners. What is new, is the promotion of the idea of a partnership with different forms of non-state and state organizations, of public and private, formal and informal agents, within what is called «a mixed economy of welfare» - a notion which has to a large extent been associated with processes of privatization. This has far-reaching effects on the structuring and delineation of voluntary action. It includes tendencies of increased statization, which do not only occur through the expansion of state apparatus, but most significantly, through the de-facto promotion of state form and state logic in the field of welfare. The dominant view is that non-profits and especially voluntary groups fear and reject domination by the state. Recent work shows that far from being two different worlds, they have a long history - which admittedly varies between countries - of interrelation of different degrees. (Kuhnle & Selle 1992). This may manifest itself in terms of tension, duplication or supplementation between the two sectors, with issues of financing and regulation occupying the front line of controversy. Nevertheless, the more diffuse penetration of market and state logic is a far wider process, bringing about changes which are seen as inescapable necessities under the pressure of present day realities and opportunities not to be missed. We could argue that the supranational character of the E.U. and the nature of its intervention in the light of integration is increasingly becoming a key factor for many far-reaching changes in the third sector.

2. The next concept to define is «social care». Following the recent upsurge of formal interest in informal care by family and community, this concept has come to the forefront of analysis, attracting special attention in feminist debates about welfare. (Bulmer 1987, Evandrou 1991, Gilroy 1981, Land 1985, Finch & Groves 1983).

The nature and extent of social care are by no means easy to define. However, it is widely accepted that caring encompasses a whole set of actions, where material and human resources are consumed with the aim to satisfy needs. It may involve relatively simple tasks, like helping with shopping and housework chores, but in some cases it turns into «tending» which is heavy, specialised labour, (e.g. caring for the disabled, the frail elderly, or the terminally ill). (Parker 1981). It is offered by a wide range of agents

in the statutory, private/commercial and non-profit sector, on the basis of a contractual relationship, or of personal obligation and reciprocity patterns within informal networks, often seen as the expression of love, friendship and neighbourliness. Pluralist social care is the core of the personal social services. Long before the recent debate about a mixed economy of welfare began, the interrelation between public and private, formal and informal agents was an established reality in this field. But it became an explicit policy issue following the welfare state crisis debate and the drive for privatization in a number of countries.

Given the centrality of relationships in the caring process and their complex nature - which is directly influenced by cultural and psychological factors - social care lends itself as a rich and fruitful ground for investigating the shifting boundaries of «public» and «private» and for challenging established dichotomies from the angle of welfare pluralism. It is also a valid field for learning about how pluralism actually works and to do so on a comparative basis both in terms of structure as well as social relations and the meaning of social action. The investigation of voluntary agency in social care is particularly valuable, because it gives us the opportunity to learn more about forms of mediation between informal and formal caring activity and explore their role in forging wider social service networks.

Keeping in mind the above, concerning the difficulties of defining «voluntary» and the centrality of caring, we focus in the rest of the paper on formal non-profit organizations which depend heavily - though not necessarily exclusively - on volunteers for the delivery of a wide range of personal social services.

Their established and changing role in Greece and their emergence in Eastern and Central Europe are examined in turn, and related to the increasing impact of E.U. interest and financial incentives.

### **B/ Voluntary Care Organisations in Modern Greece**

Voluntary organisations have been -and still are- important care providers, either in the absence or in support of state services. Some were initially organised and run by the upper classes, or prominent Greeks of the Diaspora. A number of large NGOs were set up by the palace (when Greece was still a Royal Democracy) and run with the active presence of upper class women. Others started as self-help groups and linked up with large international voluntary agencies (as is the case of the Greek YWCA, which was founded by a small group of young women refugees from Smyrna). Tradition, however, goes back to Byzantium, when Church and State combined on the basis of Orthodox values to promote institutional welfare with the large involvement of trained volunteers. For the Byzantines «philanthropia», the ideological basis of voluntary care, was a way of living and the embodiment of active membership in the community - quite a different notion from the stigmatising, residual stereotypes which account for the term's present day negative image. (Μαστρογιάννης 1960, Πανουτσοπούλου 1984, Σταθόπουλος 1990, 1995).

The Orthodox Church still occupies a central position in the organisation and provision of voluntary care in two major ways: Through the establishment and running of a wide range of formal institutions, and through the recruitment and coordination of

volunteers at the local level of the parish (enoria). The Deaconess (the predecessor of present day social workers), was a key figure, specially recruited and trained for the promotion of care services with the use of volunteers. (Ορθόδοξη Μαρτυρία 1990, Πανουτσοπούλου 1984).

Throughout its turbulent history, since its establishment in the mid-nineteenth century, the modern Greek state depended heavily on non-profit and volunteer organizations for running its social services, according to residual principles.

(Πανουτσοπούλου 1984, Σταθόπουλος 1995). Informal care at home by family and kinship networks was and still is the basis on which the whole edifice of social policy rests, according to a strong one-breadwinner model and women as the principle carers. (Lewis 1992, Στασινοπούλου 1992, 1993).

Established organizations of voluntary care share this view. They are there to support families or substitute for their absence or inability to fulfill their role. Class, Gender, Race and cultural differences are important variables in the shaping of their profile, action and supporting ideology.

Which are then the present day features of the third sector in Greece? Can we detect certain trends which may relate to processes of privatisation? And what is the relationship with the state and the informal sector? Could we detect signs of the impact of E.U. post-Maastricht policy? In the absence of valid data and research, we can only elaborate on these questions in the form of tentative hypotheses.

The voluntary care sector is part of civil society, in closer links with the private/domestic sphere, dominated by family and kinship, and the public/statutory, dominated by the state. The post-war modern Greek state rules through a system of dependency and patronage through party political affiliation. Indeed, according to some prevalent views it has structured a large section of the middle classes, as well as being a major employer and, during times of absolute rule, a highly oppressive apparatus. (Τσουκαλάς 1985, Tsoulouvi 1991).

The domestic and commercial sectors are in reality intertwined, through the proliferation of small family productive units, and the character of female employment, where we have a high percentage of «non-payd, family helping members». Similarly, the boundaries between family and kinship, and the state, are not pronounced and far from fixed. The voluntary sector exists within this set-up and is to a large extent shaped by prevailing patterns of relations between state and civil society, as well as within civil society itself. The basis of its autonomy rests with article 12 of the Greek Constitution of 1975, which establishes freedom of association and the creation of non-profit organisations.

The basic rules governing registration procedures, legal status, duties etc. are layed out in articles 78 - 107 of the Civil Code. But as in other countries, its autonomy is linked to financial independence. The existing system of non-profit subsidising is highly fragmented according to sectors and services offered, and very limited for present day standards of service operation, as well as for responding to augmenting needs. This is made worse dy the strong centralisation tradition in the Greek public sector and the fragmentation of the voluntary sector, which accounts for a big part of its lack of

bargaining power. The absence of something equivalent to a Council of Voluntary Organisations - a sign of the low level of integration and rationalisation of the sector - is also an impediment to the acquisition, processing and dissemination of information and innovation. These are available mostly to large NGOs, who are often branches of international organizations (e. g. Red Cross, YWCA).

Presently, we are witnessing an expansion of self-help and pressure groups, some of which belong to already existing initiatives (e.g. parents of disabled children), while others are in new areas, like environmental protection and antiracism. In the fields of health and welfare we have interesting examples in community mental health, involving families and specialists, many of which work in an entirely voluntary capacity, as well as a proliferation of self-help and support groups (e.g. support of cancer patients, of HIV sufferers, women who have undergone mastectomy, of parents whose children have a history of drug abuse and many others). These are quite different from the old charities run by the upper classes.

Coexistence of older and new forms is one of the key features of the current scene. Differences have to do with methods and extent of volunteer recruitment, management styles, attitudes to prevalent images and goal in voluntary work and relationships between older and younger volunteers. Many smaller groups operate solely on a local basis - dealing with issues ranging from cultural events and entertainment to religious and political aims. Given the importance of internal migration to urban centers, there is a proliferation of groups set up by people from the same region of rural Greece, or the same village. Apart from keeping alive local traditions they offer support for the integration of newcomers to the urban centers, and a variety of formal and informal health and welfare services. Support to their village or locality varies. It often takes the form of assistance in finding a job, making use of the better health services who are located in the urban centers, providing infrastructure back home, and even rebuilding whole villages. If we decide to move outside main Greece we get an even richer presence of voluntary support as a key feature of the Greek communities in the USA, Canada, Australia and other places where we find established Greek communities.

A significant change, however, has to do with a major shift in migration patterns for Greece, and the influx of refugees from the Balkans, the countries of Eastern and Central Europe and the previous USSR, as well as the returning migrants and Greeks of the diaspora, who come to settle in their country of origin for the first time. Voluntary support is gradually increasing in relation to these populations, both as part of already existing statutory and non-profit agencies, and in the form of emerging anti-racist and citizens rights groups. According to U.N. officials in Greece, a considerable part of support for their refugee services comes from the third sector.

Of course, there is the other side of the coin. The cases of fraud, aiming at tax evasion, the shadow non-profits, the increasing number of groups aiming at controlling and exploiting people who are vulnerable, as well as profitable activities masquerading as religious and charitable work. Recent changes in tax legislation may help to curtail frauds for tax evasion, but it is very difficult to detect and control the rest without seriously interfering with freedom of association and citizens' rights.

The above sketchy references reveal a landscape rich in contours and variety of colour, with sunny valleys and shady corners. Caring activities are located throughout this landscape, some as the exclusive goal of established organisations, and many as only one aspect in the diversity of collective provision.

In theory welfare pluralism should embrace the whole spectrum, but in practice it involves only certain types of organizations. The choice is to a certain degree the outcome of prevailing ideology and patterns of power distribution.

### **C/ Privatisation and the third sector- The fallacy of the public-private dichotomy.**

The mixed economy of welfare in the provision of services is a common occurrence in Greece, which has never reached the high levels of statutory provision enjoyed in developed regimes of welfare capitalism. This does not automatically imply «less state», far from it. The modern Greek state operates an extensive system of benefits, along the lines of inequality patterns and patronage. Recent developments signify a drive to privatisation in the form of supporting private for-profit systems (as in Social Security), and in the reaffirmation of gender inequalities and familist practices. In the field of social care the importance of non-profit and voluntary care is reaffirmed in relation to supporting the basis of society, i.e. the family, or rather the - idealized stereotype which veils the plurality and fluidity of existing patterns of family life. (Μουσοῦρου 1993, 1994, Στασινοπούλου 1993).

This reaffirmation, however, is taking place in the form of further centralization and attempts to promote integration and state control of the third sector. This is apparent in recent legislation for social protection (Act 2082/'92) and in the absence of legislative measures to encourage Local Government to negotiate partnerships with voluntary agencies.

The above developments can be interpreted as a tendency towards further state control, as we have recently witnessed in the formal integration of the two largest prominent NGOs - «The National Welfare Organization» and «the Patriotic Foundation of Social Protection and Care» - into the public sphere, and their prospective role in further integrating and controlling a wide range of smaller non-profits (act 2027/'92). These provisions, are justified in terms of the need for rationalising the third sector in order to meet the challenges of new realities and problems. The controversy over the twin goals of rationalization and democratization of services is a thorny issue within the voluntary sector as well, given its emphasis on autonomy.

If we consider these changes separately, they are a feature of a process which started long ago, that is, the increasing statization of a section of the third sector, which had close links with the state from the very beginning of its existence. Viewed in relation to the overall tendencies in the systems of social security and social protection in response to a deepening crisis, these are aspects of the process of restructuring within the public sphere, in response to the wider restructuring of the public-private mix. It is therefore, we maintain, a fallacy to assign the voluntary sector to the private realm and to talk of the increasing importance of its role as an aspect of privatization. Our vision is further obscured by approaching such phenomena from the angle of a private - public

dichotomy, where the private is equated with the non-state dominated by the market, and the public is equated with the state dominated by its monopolization of collective provision.

In reality, we are confronted with a range of different articulations of «the collective form» operating across shifting boundaries between what we have come to know - in western capitalist societies - as the public and the private, the individual and the collective aspects of social structure and agency. A brief look into present day development of the third sector in Eastern and Central Europe presents such issues in sharp relief.

#### **D/ Voluntary Care in Societal Transformation: The case of Eastern and Central Europe:**

In present day Eastern and Central Europe, under the transition to a market economy and the restructuring of social relations, the form, content and structure of social policy are still largely undecided, (Gotting 1994, Szeman & Gathy 1993).

This is not surprising, if we consider that welfare regimes are the outcome of processes of long transformations in fundamental, historically and culturally specific, social relations of production and reproduction. State domination under the old regime was a key characteristic of the public-private mix. Nevertheless, we know very little about the private sphere in these societies, especially the private/domestic, as well as the extent of the informal sector. How extensive was the mesh of networks of informal care under the previous regime? What is the impact of present day problems on their structure, density and ability to respond to need? The answers to such questions are neither simple, nor easily forthcoming. Moreover, the thrust of debate is on market and state and the processes of marketization and democratization, with a view of privatization which focuses on the articulation of a new public-private(market) mix.

In this climate the voluntary sector seems to be going through a renaissance. Accounts from Poland, Hungary, Czechoslovakia, show a dramatic increase in numbers and involvement of non-profit and voluntary organizations. It seems that the retreat of the state has allowed that part of civil society to resurface. How far is it considered a substitute for state welfare? How ready and able is the third sector to face up to present day challenges created by mounting problems, unmet needs and the absence of an established welfare regime to support it? What is the nature of the relations with the domestic and informal sector? What is the extent of involvement and support by foreign voluntary agencies? And, most importantly, what is their role in the democratization process? Do they promote active citizens' participation and empowerment, or are there signs and fears of substituting one form of domination for another? Accounts like that of the Hungarian Maltese Charity Service are both interesting and revealing about the process of transformation in the third sector in these societies. (Szeman & Gathy 1993). One important feature is the importance of foreign aid and the extensive western presence. As experience in Greece shows, especially during times of extensive restructuring (as in the end of the 19th century, the beginning, of the 20th and the years of reconstruction in the post war period), there are dangers in trying to immitate western models of welfare mix without taking sufficiently into account your own existing

patterns, strengths and weaknesses. The danger is even greater if we consider that prevailing analyses on welfare regimes, privatization and the mixed economy of welfare are couched in terms of the realities, interests and outlook of western, industrialized societies, and the dominant forces which shape social policies.

However, there is one crucial difference in what is happening today and this is the presence of the European Union and the impact of present forms of supranational interests and policies. A brief consideration of its involvement and impact on the restructuring of the third sector introduces yet another dimension to its present features and prospects.

### **E/ Supranational considerations: The impact of the E.U. on the Voluntary sector.**

The impact of the E.U. on the voluntary sector, is present in different, though interrelated ways:

a/ Directly, through the transfer of funds, technical and scientific support, as well as the promotion of formal participation of these countries in programmes which aim at strengthening the position of the third sector. Although formal references - in the Maastricht Treaty and a number of policy documents, white Books etc. - are still general in character, their importance cannot be ignored.

b/ Indirectly, through their increasing involvement in networks and countless activities which favour integration, and the gradual promotion of the idea of their future share in the realization of a United Europe.

The impact on voluntary care organizations must be approached at the national and supranational level, by assessing the importance of the E.U. as an agent of change, both, in the restructuring of the third sector within national states, and in the promotion of supranational structures.

1/ As regards the first, evidence from Greece may well lead us to the hypothesis that the emergence of the E.U. as a major source of funding activities and opportunities for information and expertise, may have far-reaching effects on the structure and degree of integration of voluntary organizations.

There are already signs of increased interests to create something equivalent to a C. V. O.. This, as we have already mentioned is by no means an easy task. It may lead to increased competition and tension as regards possible patterns of domination, which could reinforce fragmentation and cleavages.

On the other hand, it may also lead to better management practices, access to information and other resources.

It is quite possible, however, that the larger and more influential non-profits - already in close links with the state - or/and internationally based organizations, will benefit the most. Taking advantage of the openings offered by E.U. opportunities depends, as we know, to a large extent on specialized knowledge, prompt access to information, and acquisition of special skills to handle the intricate and extensive bureaucratic procedures and structures of its agencies. That in itself is of course a potent incentive for integration and rationalization of the third sector.

Voluntary organizations in Eastern and Central Europe may be facing similar dilemmas. On the other hand, given the present, yet undecided nature of their

relationship with state and market, the general state of flux in these societies and their relative recent expansion, we may see a weaker presence of entrenched interests, loyalties and values, and less obstacles for supranational activities.

2/ As regards the promotion of supranational structures, a closer investigation of the recent proceedings and the statute aiming at the creation of a European Association structure gives us an idea of the difficulties involved in such a venture, as well as which part of the non-profit and voluntary sector the E.U. legislators had in mind for such a scheme. (Commission of the European Communities 1991).

According to what is stated in the statute itself, the aim is to promote the creation of supranational NGOs through the partnership of organizations from different member states. The delay in the materialisation of the basic legal framework so far is attributed to fears of tax evasion and fraud, as well as the difficulties in reconciling major divergencies in the sector.

On the other hand, through the indirect processes mentioned above, and the soft measures which promote integration with the creation of positive climate, the supranational presence of the third sector is becoming a reality. We have examples of successful pressure group presence. The success of FEANTSA, the association of NGO groups for the promotion of housing rights in putting homelessness on the agenda of E.U. policy, and the effect of environmental groups on policy formation and implementation, bear witness to such developments. It remains to be seen whether the emergence of a supranational arena will strengthen the position of voluntary organizations in the multiple games played in the process of E.U. policy formation.

### **F/ Concluding Remarks: Voluntary care in the welfare mix - Future Prospects**

Voluntary care is characterized by diversity in structure, aims, degree of integration and potential to respond to opportunities for change presented by the E.U.

Definition and delineation of the voluntary sector is in itself a difficult and highly debated issue, as well as its interweaving with formal and informal care in the public-private mix.

Although we must avoid glorification of voluntary action, we cannot deny the importance of this sector for meeting needs as well as affecting continuity and change.

Notions of privatization which view the increased role of the third sector as a shift from public to private welfare fail to acknowledge the processes of restructuring within the public sphere, and the articulation of different expressions of «the collective form». This is qualitatively different from the view which sees voluntary care as an intermediate position between the family and the state. (Evers 1995).

A comparative investigation of voluntary organizations in Greece and in Eastern and Central European countries raises important questions about their role in the provision of welfare as care givers and as agents of social control. Given the present climate of uncertainty their future prospects are not clear. Undoubtedly the E.U. is a major force in their restructuring and modernization, but we must be aware of the limitations and unequal distribution of expertise, access to information and funding at national and supranational levels.

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