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## CONTENTS

### ARTICLES–STUDIES

**EWA PRZYBYLSKA**  
*European Tendencies in Adult Education*  

**KAREL RÝDL**  
*Educational Policy from a Different Point of View – “Hikikomori” as a Result of Global Influences?*  

**JOLANTA GROTOWSKA-LEDER**  
*Contemporary Polish Poverty and Gender*  

**KRZYSZTOF OLECHNICKI**  
*Everyday Life in the Mirror of Photoblogs. Social Functions of Photography in the Age of the Consumer Culture*  

### STATEMENTS–DISCUSSIONS

**MAGDALENA DYBAŚ**  
*Quality Assurance System in Bulgarian Higher Education – Development or Stagnation?*  

**MARTA KOTARBA-KAŃCZUGOWSKA**  
*On Difficulties of Early Foreign Language Teaching – Based on Observation of the Organization of Language Learning of Bedouin Children in Israel*  

**KRYSTYNA FALISZEK, EWA LEŚNIAK-BEREK, SABINA PAWLAS-CZYŻ**  
*Education for Social Work on Example of Social Projects by Students of Social Work College in Institute of Sociology at University of Silesia*  

**BEATA ARCIMOWICZ, KATARZYNA CANTARERO**  
*New Directions in Psychological Research on Culture*
SPECIAL STATEMENTS

MIROSŁAW GREWIŃSKI

MAREK CHAMOT
1st Congress of Culture Experts in Poland ........................................... 151

REVIEWS—REPORTS


Dariusz Góra-Szpopiński (rev.): Justin Vaïsse, Neoconservatism: The Biography of a Movement; Jesús Velasco, Neoconservatives in U.S. Foreign Policy under Ronald Reagan and George W. Bush. Voices behind the Throne; C. Bradley Thomson, Yaron Brook, Neoconservatism: An Obituary for an Idea .... 167
1. Introduction: Why adult education in particular?

One does not need to be a watchful observer of the European Union education policy to notice that over the last decade adult education has been assumed one of its priorities. The very concept has not frequently appeared in the official EU documents since 1996, though this year has been declared by the European Commission The European Year of Lifelong Learning. Nevertheless, adult learning as an aspect of lifelong education undoubtedly is gaining importance. There are several strong arguments which have determined the fact that learning in adulthood has become an area to enforce decisive actions, both in politics and educational practice as well as research on education and society.

The first reason, perhaps the most significant one, is demographic change in Europe, especially the rising expectations towards lifespan in good physical and mental condition. Assuming that an individual becomes a potential participant in adult education at the age of 25 and benefits from these services until the age of 80, adult education has a period of 55 years to manage in the life of the growing adult population, unfortunately within the rapidly ageing European society.

The second reason is that the present day along with promptly occurring technological, social and civilization changes does not tolerate stagnation at any level of human functioning. The modern European citizen, whether they like it or not, should be able to raise his/her professional qualifications, improve his/her knowledge and various social competences. Otherwise, they face the threat of cruel social marginalization. A longer moment of rest, being at a standstill and the escaping peloton is beyond reach.
Thirdly, in most European countries, adult education for decades has belonged to an area of less importance to the education policy. Reforms, growth strategies and financial resources have concentrated on the sectors conventionally perceived as the pillars of national education system. Primary, secondary and higher education have attracted the attention of political decision makers, who as a consequence, have failed to acknowledge the need to generate an appropriate background for adult education development.

The fourth reason for the growing interest of education policy in adult education is fairly simple. Politics unfolds within the economic context.

2. Adult education in European Union policy

Throughout the European Union a key concept symbolizing modern education policy is known as the Lisbon Agenda (2000), named so in honour of the city in which it was adopted. The Agenda's main intention was to make Europe: “the most competitive and dynamic economy in the world based on knowledge, enabling sustainable economic development, followed by qualitative and quantitative improvement in employment and greater social cohesion”. In a way, EU documents resulting from the Lisbon Strategy: Memorandum (2000) and The Action Plan: Lifetime Education (2001) are still at the heart of the European Union education policy. The Memorandum sets out six objectives, more detailed than those contained in the Lisbon Agenda: easy access to education offers, increased investment in human resource development, innovation of teaching and learning methods, advancement of participation assessment instruments for education offers and results, easier access to information and counselling along with an opportunity of learning in the environment surrounding the individual.

The European Union policy is heavily dependent on the interests and objectives of individual Member States. Although the Treaty of Maastricht of 1992 has made education the domain of EU policy, governments still reserve their right to make decisions and individually take responsibility for the functioning of this state’s sector. Hence, the European Union does not adopt any acts, does not impose any solutions on lifetime education on the Member States, does not decide on the ac-

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tions of individual countries, merely inspires, stimulates and provides orientation standards, the so-called Benchmarks.

 Nonetheless, EU has repeatedly taken the opportunity to use the most of its potential. An example of a significant role in initiating changes might be the previously mentioned Memorandum. In many countries, it has stirred up a debate which has contributed to accelerating actions, or has at least helped governments determine the current path, which is expressed in the form of national development strategies for continuing education that have increased in numbers since the Memorandum was officially announced. An effective instrument to initiate changes, which supports certain transformations and simultaneously creates European networks of cooperation, are among others education programs such as Leonardo, or Socrates, designated exclusively to support the adult education sector. In 2007, the implementation of a subsequent program, the Grundtvig Lifelong Learning Programme commenced. In 2009, the Grundtvig program was extended by a few new projects, including the Seniors Voluntary Project\(^2\).

### 3. European Union education policy and national systems of adult education

From the perspective of the Polish adult education, the European Union education policy has a considerable executive power. It inspires the progress in adult education at several levels:

- **At the level of education policy**, both the Lisbon Strategy and Memorandum as well as other EU documents, resolved the issue of setting a particular course of developing the continuing education sector by the government. The Polish objectives of adult education coincide with the ones of the European Union and the remaining Member States.

- **At the level of institutional adult education**, the increasing commitment of institutions and associations to implement financial projects within the framework of EU programs can be observed. Consequently, acquisition of European quality certificates by adult education providers, development of procedures which guarantee quality of educational services, modernization of marketing strategies and structures of administration have all become more and more common. In addition,

European cooperation is conducive to innovations in the sphere of education programs and teaching methods.

**At the level of teaching**, the European Union education policy has clearly outlined the quest to professionalize the teaching personnel. The priority issue for the European Commission – to employ persons with adequate professional training in adult education institutions is a reaction to a long-term negligence in this area. All European countries have applied clear regulations regarding professional qualifications in preschools, schools and universities, at the same time allowing almost complete freedom in the adult education sector. Following the footsteps of other Member States, Polish adult education institutions are also paying more attention to skills and vocational development of their employees.

**At the level of learning**, this EU policy is gradually replacing the paradigm of lifetime education as a way of life, a method for achieving success in the professional and personal areas of activity. The idea of lifelong education has primarily been understood in the instrumental and economic contexts, which in its essence leads to the sphere of vocational activity. The Memorandum, together with their specific objectives, has put the stress on amplifying the employees competitiveness, and improving their qualifications and competences, which increase their chances on the labour market and comply with its requirements. It is worth mentioning that in the history of EU education policy, also other issues were brought to light. The Faure Commission Report of 1972 *Learning to Be: The World of Education Today and Tomorrow*, or Club of Rome Report have proved the importance of education to peace at present and in the future, of equalizing the odds on a global scale, the necessity to control technology, and issues related to the future world of work, to a lesser extent, engaging adaptation, instrumental qualification for its needs or global competition on the labour market.

Contemporary education policy in the European Union primarily promoting education and qualification for the benefit of the labour market, has not only influenced the concepts of education policy in each Member State, but also the attitude to education and the value system of European citizens. A positive trend in the area of learning, popularized by the European Union, has been the growing interest of learners in non-formal learning. In social consciousness, new and little explored areas in science and contexts of learning, such as learning and resting in one’s workplace, or treating social activities and human interactions as a form of learning become more and more common. The European Union initiatives are conducive to the enrichment and diversity of learning places, striving for certification of competence acquired outside the formal education system.
4. Adult education priorities

Trends and tendencies presented below do not cover the whole spectrum of initiatives and actions undertaken today at the European level. The following priorities listed in this article contain the subjects which are of an increased interest of national politics and are treated with privilege in the framework of European projects along with bilateral international cooperation between various partnership organizations. Moreover, the following issues have been considered with greater attention by scholars and the science.

5. Professionalisation in adult education

European Commission communication on adult education in 2006 entitled Adult Learning. It Is Never too Late to Learn, the first EU document on adult education as an independent sector of education, underlines the significance of vocational qualifications and development of persons working in adult education sector due to the progress in this field\(^3\). The subsequent announcement published a year later, entitled It Is Always a Good Time to Learn, set the objective of: qualification standards development for adult education personnel\(^4\). In the wake of European Commission's political declarations, specific steps have been undertaken to implement this postulate. Thanks to financial support of the European Commission, in 2007 a group of experts determined the competencies in continuing and adult education (European Research Group on Competences in the Field of Adult and Continuing Education), coordinated by the German Institute for Adult Education (DIE). The results were used by the Dutch Institute Research voor Beleid to publish a report on vocational issues of persons employed in adult education sector in Europe\(^5\). According to the paper, the European Union lacks any common standards on qualifications of people working with adult students, not to mention uniform standards at the national levels. As a consequence, efforts to develop a European model of qualification for persons engaged in this profession have been recommended.

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\(^3\) European Commission, Adult Learning. It Is Never too Late to Learn, Brussels 23.10.2006.


Currently, the Dutch Institute, on behalf of the European Commission, has continued to work on creating a profile of key competences for specialists in adult education. Measures aiming at professionalisation of adult education are being undertaken on a large scale in Europe. Projects bringing together research workers from various countries, who specialize in this issue are being implemented. In 2008, the European Society for Research on the Education of Adults (ESREA) established a network of cooperation for adult educators and trainers (Network on Adult Educators, Trainers and their Professional Development). At the same time, there has emerged a new initiative uniting research workers from Asia and Europe to conduct surveys under the motto: *Professionalisation of Lifelong Learning with Special Emphasis on Teacher and Trainer*.

So far, the research on professionalisation has focused on developing both a profile of personnel competences for adult education and common European contents, along with education objectives for future adult educators. This aim appears to be a huge challenge since defining only the areas of occupational activity for the professionals operating within adult education sector may cause many difficulties. First of all, this field assumes enormous proportions – adult education market is becoming one of the strongest branches for domestic economy of every member state – it comprises adult educators, managers of both educational and cultural institutions, vocational education instructors and other specialists with various skills, vocational counsellors, coaches, animators, or specialists creating computer programs for adult teaching and learning. Second of all, the entitlements to perform occupational activities in the field of adult education are not regulated by any of the European countries. There is an immense diversity of legitimate positions of those in the profession (that concerns both full and part time employment, commission contract, etc.).

Thirdly, in adult education there are vocationally active graduates in various fields of study and representatives of different non-academic occupations. Fourthly, persons working in the field of adult education often do not identify themselves with the practised profession. In connection with the specifics of occupational roles in adult education and the increasing social demand for work in the area, there emerges an urgent need to set competence standards that would authorize professionals to perform one or many functions within this field of education, allowing for the need for education offers and vocational development of specialists in adult education, as well as creating concepts and eligibility systems.

One of the first attempts to develop a European model of studies, based on three levels and consistent with the foundations of the Bologna Process, has been the project coordinated by the Nicolaus Copernicus University, Faculty of Pedagogy.
in Toruń, which was realised in 2004–2006. Twelve institution from seven European countries, including Turkey, representing the academia and adult education institutions, submitted models of undergraduate, master and postgraduate studies together with organization outlines of adult education studies which fulfil the expectations and formalities required in their countries.

An innovative project on a global scale are master studies in the field of European adult education (European Master in Adult Education) that have been offered by the University in Duisburg-Essen for several years now. Students from all over Europe are obtaining qualifications to practice professions in various areas of adult education at the European level.

6. Adult education versus social exclusion

Traditionally, adult education has been perceived as the territory for social activity whose task was to eliminate deficiencies incurred during childhood and adolescence. Only the growing importance of the lifelong learning paradigm in the social consciousness may guarantee a new image of learning in adulthood. Nowadays, regardless of education or professional qualifications, it is perceived as a necessity. An analysis of participants in educational offers from different European countries produces the same results: adult education has become a tool in the hands of people characterised by a very high level of education or solid professional qualifications. Therefore, instead of equalizing opportunities and integrating, adult education causes greater inequality and social disintegration.

The European Union is far from putting the fundamental goal of the Lisbon Agenda into action: to combat social exclusions. None of the ambitious postulates to build social coherence, prevent any kind of discrimination, or marginalization, to allow for learning opportunities relevant to all social groups at the European level, and finally, to develop new basic competences for European citizens, have been completed. On the contrary, Europe faces the emergence of new groups at risk of social exclusion. The marginalization affects functional illiterates, people who represent professions which become extinct in Europe (e.g. a seamstress);

6 TEACH – Kształcenie specjalistów edukacji dorosłych w edukacji ustawicznej i szkolnictwie wyższym [TEACH – Adult Education Experts Training in Continuing and Higher Education], E. Przybylska (ed.), Toruń 2006. Publications available also in English, German, Hungarian, Bulgarian, Turkish, Lithuanian and Romanian.

7 Deutsches Institut für Erwachsenbildung, „Jahresbericht“, Bonn 2009, p. 20.
those who for various reasons have no access to educational offers and modern technology, nor can take care single-handedly of their own education.

At present, a typical European phenomenon is the increased participation in learning opportunities of people over 60. It appears that some persons long for knowledge and competences development, although a proper infrastructure or access to high quality educational offers, which would satisfy people’s needs and expectations, have not yet been provided by many European countries. In Poland, a government program *Intergenerational Solidarity 50+* has been launched, the goal being to extend the vocational activity of elderly people. It consists of numerous solutions directed to employers, training courses organizers, employment services, and includes proposals for educational programs, for example addressed to those with low competences.\(^8\)

Europe is shocked by the size of secondary and functional illiteracy of its population. Presumably, complete illiteracy does not affect a great deal of inhabitants, however, densely populated European communities lack basic competencies in writing, reading with comprehension in their native language, and in numeracy. The survey (International Adult Literacy Survey – IALS), conducted by the Organization for Economic Cooperation and Development (OECD) in the second half of the 1990s, provided extremely disturbing results for the majority of European countries. In the case of our western neighbour, the percentage of people with a very low level of literacy was 10%, and low level of literacy was 30%.

Unfortunately, in Poland the issue of low literacy appears to be far more dramatic. The level of adult Poles’ competence is considerably different from what has been revealed in the surveys conducted in more developed countries. The group of persons with “very low level of literacy” is 42.7% of adults, and 30% is the group with “low level of literacy”.\(^9\) However, the alarming results have not triggered any definite actions to raise the basic competencies of the Polish society. This issue is quite different in the Western Europe countries. For example, in Germany the adult education at the level of elementary school has been treated for several years as a priority of the public education policy.

Several initiatives have been developed due to *The United Nations Literacy Decade*, proclaimed by the UN for 2003–2012. In 2003, *The Agreement for Literacy and Basic Education (Bundnis fur Alphabetisierung und Grundbildung)* originated in the Federal Republic of Germany to initiate and coordinate educational programs

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\(^9\) Ibidem, p. 15.
implemented by various social partners. Along with the Federal Ministry of Education and Research, the German Institute UNESCO, the Agreement members also included key institutions of adult education, research centres, trade unions and publishers. For the last decade, numerous public campaigns have been conducted (advertising on television, at the cinema and all media, helpline, brochures, posters, exhibitions, mobile counselling centres) to inform about the issue and invite the public to benefit from a wide range of offers regarding basic education. Unfortunately, neither Germany, nor other EU countries have so far conducted a research which would highlight the significance of the issue and the outcome of projects implemented so far. At present, under the aegis of the federal government, a research program which aims to provide a thorough insight into the situation is carried out. It embraces four substantive issues:

1. Basic education and literacy research as well as the specifics of the recipient group, including relevant statistics research;
2. Actions to improve the quality of educational programs and counselling as a means to facilitate the access to the offers for the parties concerned;
3. Analysis of indispensable, key competences within economic and employment challenges;
4. Elaborate vocational development methods of personnel education, acting in the field of literacy and basic education for adults.

One must allow for the fact that educational activities in the area of literacy and basic education will not solve the problem of functional illiteracy. The fundamental skills which enable a modern European to function efficiently at the social level go far beyond reading, writing or numeracy. Literacy is defined as a particular capacity and mode of behaviour: the ability to understand and employ printed information in daily activities, at home, at work and in the community – to achieve one's goals, and to develop one's knowledge and potential. Differences in levels of literacy matter both economically and socially: literacy affects, among other things, labour quality and flexibility, employment, training opportunities, income from work and wider participation in civic society.

The priority is to break the taboo and myth of Europe as the continent where the problem of literacy and basic education for adults has been solved. In particular, the countries of the Central and Eastern Europe reluctantly admit considerable deficiencies in this area. In the Western Europe the problem is addressed with

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increasing openness. Even Switzerland – the wealthy country known for high quality of life, admits that 22% of its inhabitants have low competences in the field of reading, writing and numeracy\textsuperscript{12}.

7. Cooperation and competition

It might sound as a paradox, however, today’s growing cooperation between institutions and social partners involved in adult education and the intensified competition between them, have nearly become a common phenomenon in the countries of Western Europe. Newer and newer providers of adult education services are emerging. It appears that adult education has become a very lucrative venture. Creating a suitable profile for his/her services, each service provider seeks a niche on the market. New educational offers have emerged, becoming a smash hit of the season or remaining permanently in the programs of adult education institutions. Also, the boost of internationalization is visible on the education market. Large corporations, as well as small institutions of education, are searching for consumers from abroad. They firmly mark their presence in the field of language education, administration training or economics courses. The increase in competitiveness is conducive to reductions in public funds assigned for granting adult education. Adult education investments show a downward trend. For example, in 1996 in Germany, the expenditure for adult education from the public budget, incurred by the economy, was 27.8 billion euros as estimated by the Federal Labour Office and citizens. A decade later, for the same cause the sum was reduced by 3.6 billion euros\textsuperscript{13}.

Parallel to the growth of competitiveness, there is an increase in the interest in cooperation, mainly at the local level. Networks of various social partners are emerging, both from the education industry (schools of different levels and profiles) and from the areas of culture, economics (economic entities, trade unions, chambers of commerce, industry etc.) and administration, especially numerous in Germany, Austria and Great Britain.

In 2000, in Germany, the Federal Ministry of Education and Research, commenced financing a gigantic project \textit{Learning Regions – The Promotion of Cooperation Networks}, which included over 70 regions across the country\textsuperscript{14}. The project

\textsuperscript{12} A. Schläfl i, I. Sgier, \textit{Porträt Weiterbildung Schweiz}, Bielefeld 2008, p. 45.
\textsuperscript{13} \textit{Leben und Lernen...}, op.cit., p. 38.
has also received financial support from the European Social Fund. Its primary goal is to enhance participation of local communities in lifelong learning education, to expand educational offer and other services which induce the popularization of lifelong learning education in local communities. The partnership networks mode of action in learning regions results directly from the recommendations of the European Union policy on education. Partners are involved in ensuring transparency of offers available in each region, guidance development, high quality of services, arrangement of new facilities and learning environments, educational marketing and recognition of competencies obtained by citizens outside the formal education system.

Generally, the expectations of the project pertain to:

1. Increased accountability of entities for individual learning processes and improvement of skills for designing one’s own educational biography oneself;
2. Increased learning motivation in groups socially injured and non-participating in adult education environments;
3. Reinforcement of relations between different areas of education;
4. Formation of cooperation between educational services providers and their consumers;
5. Quality and quantity improvement of structures and educational offers regarding needs and adult education participants interest\(^\text{15}\).

The evaluation of learning regions proves that networks of cooperation integrating various regional partners, working together to promote lifelong education principles, produce measurable effects, manifested in the increase in adults participation in educational projects, as well as in the economic revitalization of the regions\(^\text{16}\).

8. Adult education survey, teaching and learning

Until the late 20\(^\text{th}\) century, research interests focused primarily on legal, organizational and institutional aspects of adult education or on learning processes in the traditional didactic situation, where the tutor communicates knowledge to an adult apprentice, and he/she in turn has a task of mastering the material.

\(^{15}\) Ibidem, p. 6.

Research topics reflected trends and political ambitions along with conditions, interests and aims which determined the functioning of adult education sector in practice. Today, the European adult education surveys are dominated by other priorities; the practice of adult learning is changing likewise under the influence of social and economic situation, new pedagogical concepts and technological capabilities. **The transformations are taking place at all levels in the processes of adult learning:**

1. Educational biographies are increasingly determined by the lifelong learning concept. Especially young well educated people collect certificates confirming their broad competencies with passion. Learning in adulthood becomes an integral part of their life strategies, and a response to the competition on the labour market;

2. Learning processes do not occur only in educational institutions. Increased social acceptance of learning in different environments, by use of a variety of opportunities, during the course of everyday social roles and human interactions. It is the learning entity that takes over the responsibility for the individual learning process and its results, and controls this process automatically;

3. The motivation for learning are the specific tasks, problems, projects and challenges. Pragmatism decides about learning. The purpose of learning is to gain social competences;

4. Learning environment is based on digital didactical resources. In addition to writing, numeracy and reading, the ability to operate a computer and use the Internet is the fourth basic human competence;

5. In teaching-learning processes, the traditional role of the teacher is disappearing. Now, his duties include arranging the learning environment, shaping the framework conditions for communication and reflection of learning entities, animation and dialogue moderation, motivation to learning, supporting the transfer of knowledge to everyday life, and guidance in situations where the learner needs help;

6. The construction of learning content takes into account the specificity of adult life in the present times. The educational offers consist of modules. There is an increase in the popularity of short-term courses and trainings carried out for example at the weekend;

7. The importance of the ability to think in global, interdisciplinary terms is increasing. Education faces new tasks: to develop the individual’s skills to independently enter the unknown areas of knowledge, to develop learning abilities and evaluate knowledge.
For the sphere of research on adult learning, two elements within the concept of lifelong learning proved to be the most inspiring. First of all, they are the postulated multiplicity space and multiple learning environments. Science so far has focused on institutions of enthusiastic attitude to innovative environments which are conducive to the acquisition of knowledge and competences. Voluntary associations and organizations, parks and recreation centres, local communities, workplace and others are being tested for their relevant application in developing versatile competences of learning citizens. In the European debates, experts are seeking ways to increase the attractiveness of the surrounding world of the individual in the context of inspiring and promoting his/her learning processes.

The second focus of science has become the learning processes of the individual. Many scientific disciplines have begun to consider adult learning: sociology, psychology, pedagogy, neuroscience and other. “Questions of different degrees of importance on learning, posed by various disciplines, are similar, even if, for the purpose of obtaining responses various concepts and methods are used. The most important questions are: Why do we learn? In what context is learning present? What are the activities through which we learn? What is the content of learning? What kind of reactions occur between newly acquired knowledge and skills already possessed? How is knowledge stored? When can we talk about success in learning?”

Regardless of tradition, cultural or social background in different countries, the European discourse on learning focuses on the following several concepts:

**Table 1. The theory of learning in concepts discussed at European level**

<table>
<thead>
<tr>
<th>Specialization</th>
<th>Representative (example)</th>
<th>Understanding of Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Psychology</td>
<td>Ernst R. Hilgard, Gordon H. Bower</td>
<td>Learning as acquiring</td>
</tr>
<tr>
<td>Critical theories of learning</td>
<td>Paolo Freire</td>
<td>Learning as product and instrument of liberation from social power</td>
</tr>
<tr>
<td>Pragmatism</td>
<td>John Dewey</td>
<td>Learning as problem solving</td>
</tr>
<tr>
<td>Humanism</td>
<td>Carl Rogers</td>
<td>Learning as experience of self</td>
</tr>
<tr>
<td>Cognitivism</td>
<td>Jean Piaget</td>
<td>Learning as change, acquisition of cognitive skills</td>
</tr>
<tr>
<td>Situational learning</td>
<td>Jean Lave, Etienne Wenger</td>
<td>Learning as participation in social processes</td>
</tr>
<tr>
<td>Constructionism</td>
<td>Ernst von Glasersfeld</td>
<td>Learning a construction of meaning</td>
</tr>
<tr>
<td>Transformative learning</td>
<td>Jack Mezirow</td>
<td>Learning as transition to a new interpretation of meanings and experiences</td>
</tr>
</tbody>
</table>

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Researchers also address issues which have so far been very rarely discussed, such as emotions, hopes, expectations of learning, happiness within the context of learning\textsuperscript{18}. The development of research on adult learning gives rise to optimism. If we have to learn throughout life, let the learning process take place under optimum conditions, and be far from stress and as efficient as possible.

9. Conclusion: Prospects for European adult education

The year 2009 was to be the breakthrough year for adult education. European circles of scholars set their hopes on World Congress of Adult Education under the aegis of UNESCO-CONFINTEA VI, which this time took place in Belem, Brazil. The results failed to impress; few specific resolutions were adopted; there was no agreement between the government representatives and the NGOs. In particular, one issue incited a firm standpoint of NGOs from over 190 countries: adult education must be recognized as an important and integral sector of national education systems together with lifelong learning system.

For a long time, there has been an ongoing debate in the European Union on the need for greater accountability of governments for the adult education area. An essential postulate to the governments refers to the matter of adopting appropriate legal solutions and budget regulations, ensuring stability of the adult education sector. Member States must assume responsibility for providing basic educational infrastructure throughout the country, providing the citizens, regardless of their social status, with an easy access to offers. This infrastructure must include, apart from educational institutions, also counselling and information centres along with the system offering high quality services.

There is no tendency in the European Union to assign the whole weight of adult education to public entities. On the contrary, social actors, in particular economic entities and NGOs, by their current activities in the field of adult education and willingness to incur costs, show that they are reliable and competent partners for public administration and local authorities, who possess the potential to bear joint responsibility for the shape of the adult education sector. Public-private partnerships, with their clear division of responsibilities, appear as the form

\textsuperscript{18} Exemplary: “Die Zeitschrift für Erwachsenenbildung” 2006, No. 1 (quarterly devoted entirely feeling of happiness in the context of learning); “Die Zeitschrift für Erwachsenenbildung” 2006, No. 3 (quarterly devoted to learning in the context of football and support).
of cooperation which can address the growing challenges to the sector of adult education today and in the future.

The central objective of European adult education remains to be the increase in educational activity of adults. Greater emphasis is placed on the need to ensure equal opportunities to everyone. Currently, it is not the most urgent issue for the statistics to show another few percent increase in adult participation in educational offers. The priority challenge is to increase the participation of persons with none or low professional qualifications, people with low level of employment, the unemployed, emigrants, elderly people and the handicapped; all those citizens who live on the margins of the society or are at risk of social exclusion.

The following years ought to bring campaigns and social offensives promoting lifelong learning. They must begin to function within social consciousness. Thus, promotion activities at the local, regional, national and European levels are essential. The main aim here is to strengthen people’s motivation and conviction that there is no other reasonable alternative than lifelong learning.

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SUMMARY

The article consists of two parts. The first one focuses on contemporary education policy in the European Union, which in my belief, has a major influence on the activities undertaken by the Member States within the framework of adult education system. The second part of the article presents selected trends in adult education development, extending over the whole European area with various intensity. They arise both from the specific social and economic situation of individual countries, and to a large extent, from the standards, norms and educational paradigms promoted by the European Union.

Key words:

Adult education, adult education in European Union policy, professionalization in adult education, cooperation in adult education, adult education versus social exclusion, adult teaching and learning
EDUCATIONAL POLICY FROM A DIFFERENT POINT OF VIEW – HIKIKOMORI AS A RESULT OF GLOBAL INFLUENCES?

1. Introduction

When we hear the term education policy, probably the first thing that comes to our minds is the connection with political ideas influencing the educational sphere and system from above, or people who, due to their political affiliation, not necessarily expertise, influence the development in this area from the position of power. Regular users or participants have then no choice but to assess a decision made by a small group of political elites, and trust arguments either for or against individual decisions within or outside the declared concept or outside what is passed off as the concept. More and more people qualified as political scientists and sociologists have their voice in education policy. The question is whether you can make an informed analysis and conduct so called independent research when historical experience and connections are used only as tools, and not as cognitive resources.

2. What difference is between is educational policy and educational politics?

To objective of the author is not to think about thus perceived educational policy and repeat the facts attractive for the media, and thus widely known, about the current state of education and learning and its causes, giving the impression of a man who “knows the ropes” and, moreover, has “the solution”. Essentially de-
pending on the person’s value orientation as to what arguments he/she accepts as supporting and rejects as irrelevant; this issue is so complex in itself that anyone who offers solutions becomes actually suspected of being superficial or misunderstanding. At the same time, I do aspire to classify terminological ambiguities created by numerous politicians and the media who, due to misunderstanding or because of their own ignorance, “juggle” quite synonymously the terms “learning”, “teaching” and “education” without knowing that some are primarily associated with personality traits, others are bound to the artificially created and ever more problematically maintained system.

Neither do I want to go into the forecasts determined by the current situation in other areas of social life, such as the rejection of the same health care system for all which entails the re-consideration of the concept of reducing compulsory education for all to promote “premium services”, which until recently were still the norm.

It is the intention of the author to **explore the possibilities to regulate certain trends in the educational policy using the source that is virtually free**, and yet can be very effective and useful. This source is the primary element of any social activity, namely the human being himself/herself, whereas the formulation of objectives, contents and forms, the organization of processes and their evaluation, ought to be considered secondary effects. Historical experience shows that natural processes of learning, resulting from the level of each individual and designed to meet the needs, have been institutionalized over time, that is formalized and regulated (as for example faith – through churches). Newer and newer information and knowledge at every level is being constantly added into these institutionalized processes. On a daily basis, we are taught and we learn to survive in this modern world increasingly through informal processes, and decreasingly through the formal ones. This art of learning is determined biologically, allowing us to develop ourselves and thus realize our own dreams, visions and hopes for our personal lives. For a long time, there has been a discussion on the crisis of civilization, its culture which has an impact on the crisis, or rather the problems of institutionalized education and teaching, therefore mainly education and school facilities. The question is whether we diagnose it as being systemic or not. The treatment should be designed accordingly.

### 3. Educational policy of today is useful for our next generation

I am convinced that the consequence of those problems is the fundamental change in the behaviour of young generations. Day after day lacks prospect for life due to young people’s approach to education as both young people and most of the older
generations have given up their dreams and hopes. We constantly complain about the speed of the world around us. Each of us wants the day to be longer to be able to manage everything. Why is it so? To further suffer the pressure to externally report the outcomes which often block our dreams and visions, at the same time causing boredom and idleness in young people. The main problem today might be the gradual loss of motivation both for learning and for life. Learning cannot be reduced to the purpose of qualification, which is the result of the funding system. There is still the aspect of personality development, which however brings outcomes hard to control and assess. How to convince teenagers to learn for the actual process of learning, for the enjoyment of each book read, of each piece of knowledge acquired. Why should they be able to read with understanding, if in the near future not even the skill of writing by hand will be needed? What is the actual result of learning processes? The saying “the end justifies the means” is seen in our world as a cliché, but why such a cliché was created in the first place? Perhaps so that we could apologize for losing ourselves, longing for something that when we have reached, we realise it does not bring the genuine happiness and satisfaction. How can we be happy when we are not even able to enjoy the pleasure?

More and more young people thrive on their woes and problems. Again, the question arises: why? Because information about disasters on our planet is spewing out from TV not moving us at all while we go on enjoying our dinner, which we take for granted. We are used to being served – and this is callousness and inhumanity, indolence. Bread and circuses without responsibility.

4. The behaviour of the human body and mind is simple and complicated at the same time

How is it possible that a person can become inhuman? Could it be the fault of primary school teachers that were unable to teach them fundamental moral and ethical values, or should we blame the parents who did not pay enough attention to him/her? No, it is only his/her fault, fault of each of us. We have forsaken our humanity, our own dreams, our desires, yearning for our own development. Our greatest sin against ourselves is that we stopped loving ourselves. However, nobody is able to teach us that we have for teaching no motivation. Neither are those teachers at the primary or high school, nor our parents able to make us respect ourselves again. We are the only ones who have to be worth something to ourselves. I think it would be very effective to support programs that would enable us to learn ourselves, that is programs that do not lead to a mere qualification or its improvement,
but lead to an increased cultivation of one’s personality. Who does not value oneself cannot consciously value others. The alienation of our times lies in the fact that we have alienated ourselves, forced by circumstances though. Previously, a close relationship between a teacher and a pupil was sound. Teachers used to know and want to know their students well, and knew most of what their lives concerned. They had no problem to approach them after school, or even visit them at their homes. They took their students on educational trips and taught them to love themselves and others as well. All was in good time, and if one’s time went slower, slower was one’s learning and slower was one’s acquiring various skills. However, the standardised and normalised the personality insufficient and troubled.

Teachers today carry an unreal means on their shoulders. Parents rely on them to provide their children with what they have neglected to, and make their child a genius who shall be famous for earning lots of money or for being charitable, fighting for the world peace. Today’s teachers cannot really show interest in their students, because the vocation is simply limited to a mere job, which with its financial rewards does not motivate them to show excessive interest in the pupils. How can an artificially created “heartless” machine teach children good behaviour and proper values. The machine will certainly not teach them anything, but the teacher will. However, if the teacher is attributed with superhuman powers, he/she will always inevitably disappoint us. It is just because teaching is not a mission anymore, but a teaching job. This is not supposed to be a criticism which would condemn the teachers of our time; it is a critique of today’s lifestyle and perceptions of life values.

Finally, another thing that ought to be considered is that, we let our surroundings feel what is happening inside us. By changing our own attitudes and behaviour, we will do a lot more for the education reform than by constant rewriting and amending ever more documents, often merely formal and irrelevant to real life. This formalization of everyday practice of teachers life is very complicated for new generations that focus in their lifestyles on the very leisure activities without own responsibilities. A good example of that is the Japanese young men’s lifestyle called hikikomori. Let us now consider the term.

5. What is hikikomori, in practice?

The Japanese term hikikomori has been known by scientists form outside Japan for about ten years. In English we can translate this term as “pulling away, being confined” and is used to refer to the social phenomenon of reclusive people (mostly
young adults, adolescents) who have chosen to withdraw from common social life, often seeking extreme degrees of isolation and confinement due to various personal and social factors in their lives.

The term *hikikomori* refers to both sociological phenomenon in general and to individual belonging to this societal group. In the European terminology, this *group of young people may include individuals suffering from social phobia or social anxiety problems*. This could also be for example agoraphobia, avoidant personality disorder, or painful or extreme shyness. The Japanese Ministry of Health defines *hikikomori* as *people who refuse to leave their parents’ house or flat, and isolate themselves from the society and their own family in their rooms for a period exceeding six months*.¹

Within the family, the isolated *hikikomori* lives without friends, uses the family house facilities (food, energy), but without personal contact with parents; his/her life programme is to follow TV, PC-playing, surfing the Internet or reading comics about the virtual world. *Hikikomori* often sleeps during the day and is active during the night. He/she doesn’t need the society and lives at the cost of their own family not attending school or having a job. While the degree of the phenomenon varies depending on the individual, some young people remain in isolation for years, or in rare cases, decades. *Hikikomori* very often starts with school refusals (Jap.: *futoko*) in Japan.

### 6. The present situation worldwide

According to the estimates by a psychologist Tamaki Saito, who first coined the phrase, there may be one million *hikikomori* in Japan, twenty percent of all male adolescents in Japan, or one percent of the total Japanese population². Although acute social withdrawal in Japan appears to affect both genders equally, due to different societal expectations of maturing boys and girls, the most widely reported cases of *hikikomori* come from Japanese families with male children who seek external intervention when a son refuses to leave a family house.

In the last ten years we have been able to observe the increase in the number of this social phenomenon in South Korea, Taiwan, China or in England and the Netherlands in younger children, too. A lot of viewers of the BBC home page ad-

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mitted to have had personal experience with lifestyle similar to hikikomori. Now we can find this type of social withdrawal phenomenon in the USA, Canada, Australia or in Germany.

The main problem is not restricted to Japan where hikikomori lifestyle is one of the reasons for a large increase in criminal behaviour of young people, which is caused by violence and aggression present in comics. The massification of hikikomori in other countries raises an important question: What is the future of our society? An answer requires an analysis of the causes of this negative social reality. How can we develop resocialisation activities effectively to save this “lost generation”? I mean this is an actual and a very complex problem for the science of pedagogy and educational scientists to address.

7. Who or what is to blame?

In general, the prevalence of hikikomori tendencies in different economically most developed countries (how far is the hikikomori phenomenon from our country?) may be encouraged and facilitated by three primary factors:

a) Middle class affluence in a post-industrial society, such as Japan, allows parents to support and provide for an adult child indefinitely within family house. Lower income families do not have hikikomori children because socially withdrawing youth is forced to work outside the house if they cannot finish school, and for this reason, potential isolation in one’s own room is prevented at an early stage;

b) The inability of parents to recognize and act upon the youth’s slide into isolation, soft parenting, or even a co-dependent collusion between a mother and son, known as amae in Japanese. When a young person withdraws from life, parents can act or respond in such a way that causes the child to become even more seclusive;

c) A decade of flat economic indicators and a shaky job market makes the pre-existing system requiring years of competitive schooling for elite jobs a pointless effort. While, for example, Japanese fathers of the current youth generation still enjoy lifetime employment at multinational corporations, incoming employees in Japan enjoy no such job guarantees in today’s job market (the existence of the so-called freeters is a good example). Young people are savvy enough to see that the system relevant to their grandfathers

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and fathers no longer works, and for some the lack of a clear life goal makes them susceptible to social withdrawal as a *hikikomori*; 

d) The number of young people who are not able to achieve the higher and higher quality levels and fulfil the expectations of the society has increased. A popular outcome for these people is personal isolation from the society, and living at other people’s cost.

The popular Japanese psychologists, a lot of sociologists and educational scientists perceive the ground and reason for the increase in the number of crimes and the growing number of *hikikomori* as evidence for serious flaws in the Japanese educational system. Shortly saying: the problem is stress caused by exams (the so-called exam hell, based on the pass-or-fail ideology). Many parents have gone through the same stress when they were children. At home, there is not much sympathy for teenagers studying for exams. In addition, more pressure has been placed on kids to get into good junior high schools and high schools than ever before. The last years of economic recession have also added to the stress and importance of entrance exams. The stress often disguises teenagers incapable of dealing with the outside world, and they resort to becoming *hikikomori* (homicidal teens or solitaire eremite). Changes in educational systems, not only in Japan, are needed, the aim being not only to increase the quality, but more, to rescue the life of these young private eremites or freeters, NEET (Not currently engaged in Employment, Education or Training) and parasite singles. The personal or social dimension of the problem of this new group has been considered by V. Cílek.

8. Conclusion

The discussed issue may be seen as an occasion for resocialization activities. We try to develop educational models to have specialists who are able to be in contact with the Czech families with *hikikomori* young people, aiming to help them be active and positive when they confront the principles of our society. In the Czech society, similarly to the Polish one, *hikikomori* is a relatively new problem, but in the near future it may become very common. By that time, our task is to prepare competent specialists who would be able to help parents, too.

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4 Cit.: http://psychology.wikia.com/wiki/hikikomori.
6 V. Cílek, *Krajina z druhé strany* [Lifespace from other Side], Praha 2009, pp. 120–125.
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SUMMARY

The contribution addresses a trend within educational policy that does not take into consideration its main creator, that is the human being as such. Legislative interventions aiming to institutionalize educational processes hinder the development of creativity and invention of an individual. These facts result in behaviour changes of new generations who perceive such a state as standard and adjust to it. Education no longer performs its developmental and cultivating role but has been limited to the qualifying aspect, which has serious moral consequences for the society. We have been addressing the notions of humanity, solidarity, obligation, etc. as they are viewed by new generations differently than it used to be commonly accepted. One of the ways to improve the situation can be seen in the individual’s obligation to cultivate his/her behaviour and in determining achievable objectives for personal development. As an example, the author presents a new lifestyle of some young Japanese men called in Japan hikikomori.

Key words:

Educational policy, cultivation and qualification functions of education, creativity, self-responsibility, lifestyle, hikikomori
1. Introduction

Contemporary poverty is a very complex phenomenon and in order to comprehend it one must allow for a variety of its dimensions, like basic demographic criteria such as gender. In both developed and developing countries, the risk of poverty is gender specific. We study this social phenomenon using two categories: female poverty and feminization of poverty. They are applied to reveal that women are affected by poverty to a larger extent than men. General study on the relation between sex and poverty has been evolving from the one-dimensional approach – the share of women among the poor (women and poverty) towards the development of poverty feminization approach.

2. Female poverty and poverty feminization concept

2.1. The beginning of the concept

The history of the feminization of poverty idea dates back to the 1970s, but has not been popularized until the 1990s. The concept became known as a result of a study

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1 There are other very important criteria of differentiating contemporary poverty: age (children’s/old people’s poverty), duration period (short-time poverty, chronic poverty), space (urban/rural poverty, concentrated poverty).

2 United Nations has prepared two documents that touch upon the subject of poverty feminization: in 1996 the Resolution Adopted by the General Assembly on the report of the Second Commit-
by Diane Pearce *The Feminization of Poverty: Women, Work, and Welfare* in which she focused on gender patterns in the evolution of poverty rates in the United States between the beginning of the 1950s and the mid-1970s. She used the term for the first time in the study mentioned above, underlined that poverty had suddenly become feminine and documented that the majority of the poor (2/3) were women and that the rate of women-headed households had disturbingly increased. The idea has become popular both in public and scientific poverty analyses, especially in the field of social policy in the perspective of struggling with poverty.

In Europe, since the beginning of the 1990s, social researchers have been more interested in the problem of female poverty than in the process of poverty feminization. Mary Daly in her unpublished paper entitled *Europe’s Poor Women? Gender in Research on Poverty* identified the place of female poverty in research to date, and stressed that at the end of the 20th century, the scholarship on poverty was rather one-dimensional, concentrated mainly on defining poverty in terms of income and on measuring it in relation to income cut-off points. She underlined that poverty among women had been largely ignored and the studies had used the methodology which had been incapable to account for the position of women fully. Today, the situation in the field has improved, though there are still methodological discussions and lack of clear-cut definitions of the category.

Although the feminization of poverty is mainly the problem of less developed countries, it has recently become a significant phenomenon in the countries whose economies are in transition as a short-term consequence of the process of political, economic, and social change.

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economic and social transformation. The problem has begun to be important in many developed countries: the USA, in Canada and in some European ones such as Great Britain, Sweden, France, or the Netherlands as a very significant in the context of its consequences, i.e. intergenerational inheritance of poverty and children poverty. In the majority of societies, women – who are principally responsible for childcare, children, and in consequence for the future of their countries – live their lives in poverty.

2.2. The concepts of women’s poverty and feminization of poverty

The concepts of women’s poverty and feminization of poverty are not clear. Female poverty means that the rate of poverty among women is higher than among men. Higher poverty is a state, feminization of poverty is a process. Feminization of poverty implies changes. However, there is little clarity about what the feminization of poverty means, or about whether such a trend can be empirically verified. Its

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7 The term *feminization of poverty* originated from the US debates on single mothers and welfare. Recently, in many world’s and European countries the problem of women’s poverty has been noticed and projects have been launched to improve the economic situation of poor women. There are many such initiatives in developing African and Asian countries conducted by world organizations (UNDP, the World Bank) and also in European Union, meant to alleviate poverty by empowering women not only in its member states. One of the last example: since July 2008, the EU has financed projects in Tajikistan, aiming to support the rural population with a particular attention to local women’s needs. Through these grants women’s socio-economic conditions were to be enhanced by establishing sustainable Centres in which local women would be offered access to special trainings mostly concerning income–generation activities and to the required equipment to perform those activities (women are successfully practicing activities such as: hair cutting, wool processing, carpet production, sewing, embroidery, bakery, salad preparation and so on) and get familiar with the local business sector in which they should be able to find their own way in order to strengthen their social role and increase their family’s income in the long term.

8 In the literature the term *feminization of poverty* describes a number of different phenomena, very often connected with the term feminine poverty, such as: higher poverty rate among women than among men, deeper poverty of households run by women when compared to those run by men (poverty gap), higher of women than men among the poor and among welfare recipients, the specific form of poverty of single mothers, and more severe consequences of poverty suffered by women than by men.
precise definition depends on two subsidiary definitions: of what poverty is and what feminization is. In general, poverty is deprivation of resources, capabilities or freedoms which are commonly called the dimensions or spaces of poverty. The term feminization can be applied to indicate a gender-based change in any of this dimensions or spaces. Feminization is an action, a process of becoming more feminine. It necessarily involves changes over time or populations (comparing geographical areas, for example). Feminine, in this case, is used to mean more common or intense among women or female-headed households. It is also a relative concept based on a women–men (or female-male/couple headed households) comparison, where what matters are the differences (or ratios, depending on the way it is measured) between women and men at each moment. Since the concept is relative, the feminization does not necessarily imply an absolute worsening in poverty among women or female headed households: if poverty in a society is sharply reduced among men and is only slightly reduced among women, there would still be a feminization of poverty.

There are two perspectives in researching the problem of female poverty and feminization of poverty: a perspective of individuals (women in comparison with men) and a perspective of households (female headed households in comparison with other, especially men headed households). The term feminization of poverty was initially used to mean “an increase in women among the poor” and “an increase in female headed households among the poor households”. This approach was abandoned because the measures of feminization of poverty based on those definitions can be affected by changes in the demographic composition of a population. For that reason, the feminization of poverty has been very often linked to: 1) a perceived increase in the proportion of female-headed households, the majority of which are single mother families; 2) the rise in the share of single mother families among families living on welfare; and 3) female participation in low return urban informal sector activities (these indicators are used in research on women in Sub-Saharan Africa and Latin America). The term feminization of poverty has been used to describe three distinct things: 1) that there is a higher incidence of poverty among women than among men; 2) that women’s poverty is more severe

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9 For instance, the impoverishment of female-headed households can be neutralized by a reduction in numbers of female headed households in the population. For that reason, subsequent studies adopted an alternative approach, comparing the evolution of the levels of poverty within each gender group. In the last part of the 20th century the documented overrepresentation of women among the income poor at a moment seems to be a much more common phenomenon than the process of the feminization of income poverty.
than that of men; 3) that there is a tendency of greater poverty among women, particularly associated with rising rates of female-headed households.

The problem of female and feminization of poverty could be analyzed at the macro and micro level. At the macro level, the problem refers usually to the situation of women: 1) on the labour market (higher women’s unemployment rate, women’s problems with returning to the labour market after giving birth to a child); 2) related to their incomes (lower earnings of women); 3) related to their old age benefits (lower old age pensions of women). Researchers use various indicators: the proportion of the poor who were female\(^{10}\), the ratio of women’s poverty rates to men’s poverty rates\(^{11}\), the rise of female participation in low return, urban, informal sector activities\(^{12}\). Poverty is usually measured at the family level, but sometimes the data concern poverty rates among single men and single women weighted by the proportion of adults who are single (i.e. not married). At the micro level, the position of women in poor households, their home duties and access to family resources are taken into account. Women’s and men’s duties in everyday family life are also being described.

There is an important question regarding poverty and its alleviation: why are women more likely to be poorer than men, and how does poverty affect genders differently? Answering the question, we stress that, among many other factors, the women poverty may be caused mainly by changes in: 1) family composition – dissolution of marital unions, constitution of families without these unions, higher male mortality; 2) labour market inequalities – worse position on the labour market (occupational segregation, intra–career mobility, differentiated levels of employment in paid work, wage discrimination); 3) family organization – gender division of labour and consumption within the household, gender roles regulating the control over household resources; and 4) inequality in the access to public services or in their quality, especially barriers to education for girls, educational segregation by sex, lack of women specific health attention; 5) inequality in social protection – lower access to pensions and social assistance by women, inequality in benefit concession or in benefit values in targeted policies; 6) legal, paralegal and cultural constrains in public life – property rights, discrimination in the judi-

\(^{10}\) D. Pearce, op.cit.


ciary system, constrains in community and political life, etc. The influence of the above mentioned factors depends on a society, its economic, political and cultural level of development. In each society, various determinants are responsible for the quality of women’s life but the majority of societies stem from problems related to female discrimination in the most important spheres of human life, i.e. including education, health care, equal payment opportunities and access to economic resources, participation in markets, participation in decision making processes and single female headed households.

Theories of poverty feminization apply two different approaches. The first approach refers to structural gaps between men and women in terms of employment and remuneration. Women are more threatened by poverty due to their, more limited when compared to men’s, access to the labour market. In consequence, women earn less and accumulate less means to secure their income when aged. The second approach stresses that due to the progressive disintegration of family households run by single women with children, instances of poverty are becoming more frequent\(^\text{13}\). In such families, women play the role of the family’s only breadwinners.

### 3. Female poverty and feminization of poverty in Poland

In Poland, the discussion about the problem of feminization of poverty dates back to the beginning of the 1990s, when after the fall of communism, we have started to research the problem of poverty in our society. Studying contemporary Polish poverty, its scale and various characteristics, the existence of social inequalities based on gender has been noticed. First Polish studies on female poverty were conducted among welfare recipients\(^\text{14}\), followed by statistical research on the total population by CSB and by studies on social structure\(^\text{15}\) with the application of both quantitative and qualitative methods.

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\(^{14}\) W. Warzywoda-Kruszyńska, J. Grotowska-Leder, op.cit.  
3.1. Demographic background

Considering women’s poverty and the process of feminization of poverty in Poland, it important to emphasise that\textsuperscript{16}:

a) The Polish society is feminized; women constitute the majority of the total population – 51.7% in 2009 (since 2005, the percentage has been stable), and there are 107 women per 100 men (the urban population is much more feminized that the rural one – the indexes are 111 and 101 respectively)\textsuperscript{17};

b) In Poland, we observe the accelerated transformation of the households’ structure; there is an increase in the number of small households (1–2 members from 40.6% to 48% in 1988–2002) and one parent households (from 15.4% to 19.4%)\textsuperscript{18}. As it is known, small family protect its members from poverty less effectively, especially when a woman is the head of the household\textsuperscript{19}. In this period, there are also noticeable changes in the process of getting married. There is decreasing propensity to create formal-legal relationships and a tendency to postpone the decision to get married. On the other hand, the stability of marriages is lower. Although the main reason for dissolution of marriages is death of one of the spouses, the significance of divorce as a reason for marriage dissolution has been increasing. The comprehensive information on divorce and separation is the evidence for a de-


\textsuperscript{17} Numerical superiority of women rises rapidly with age, especially in the urban areas. In the lower age groups there are more men, in the 40–44 age group is a balance, in next age groups an increasing numerical superiority of women (in following age groups feminization index visibly increasing: 60–64–121; 70–74–149). The main reason for changes in gender proportions in particular age groups in Poland is the difference in mortality by gender, also expressed by significantly higher life expectancy for women in particular age. The life expectancy for men in 2009 was 71.5 and women – 80.1 years.

\textsuperscript{18} Mały Rocznik Statystyczny GUS [Concise Statistical Yearbook of the Central Statistical Office of Poland], Warszawa 2010, p. 119.

\textsuperscript{19} The structure of Polish families and households is the consequence of patterns of fertility and processes of getting married connected with the processes of individualization of human life. Poland is one of the EU countries with the lowest fertility rate (in 2009–1.26 child per woman of reproductive period). In the last 20 years (1990–2009) we observed a steady increase in illegitimate births (by more than 250%). The percentage of such births increased from 6.2% in 1990 to 20.2% in 2009 (respectively in the urban areas from 7.8% to 22.9%. in the rural areas – 4.4% to 16.2%).
cline in the durability of formal relationships, in result of which women are less protected by marriages. The number of divorces increased by 1/2 in 2000–2009 (from 42,800 to 65,300; from 1.1 to 1.7 per 1,000 population)\(^\text{20}\);
c) In Poland, there is a remarkable increase in the female–headed households, which include women single-person households and multi-person households run by women. The demographic data reveal that:

1. The rate of incomplete families (families with one parent with child/children aged up to 24) increased from 15.4% to 19.4%, among which above 90% are single mother families.
2. The rate of single-person households – increased from 18.3% to 24.8%, among the majority of which (almost 60%) are formed by women.

Single-mother and female-headed households that do not have access to remittances from male earners are generally assumed to be poorer than male-headed households. Female-headed households are more vulnerable to increased unemployment and reductions in social and welfare spending.

### 3.2. The situation of Polish women in the labour market

Labour market approaches offer an alternative framework for examining questions of gender and poverty, which avoid the problems of aggregation at the household level. Position on the labour market is one of the most important factors of the risk of poverty. The better job one possesses, the lower his/her risk to be poor is. Researches argue that the data on female and male employment rates and unemployment rates, and the level of average salaries are enough to estimate female poverty rate, because the risk of being poor is visibly higher among unemployed persons and families with unemployed members, and people with low income from work and pensions.

In Poland, during the whole transition period (1992–2009), when the economic activity was dropping and unemployment was increasing, women’s situation on the labour market was worse in comparison with the men’s (Figures 1–4):

- Female employment rate was visibly – by about 12.6–15.8 percent points – lower than male; in IV quarter of 2009 43.3% and 58.3% respectively;
- Female unemployment rate was visibly higher – by about 10–27% – than male; in IV quarter of 2009–9.4% and 7.8% respectively.

\(^{20}\) *Mały Rocznik Statystyczny GUS*, op.cit., p. 122.
It should also be added that women earn less than men by about 15% per month (Table 3).

**Figure 1. Employment rate by gender – based on the LFS (Labour Force Survey)**

![Graph showing employment rate by gender over the years 1994 to 2009.]


**Figure 2. Differences between men and women employment rate 1994–2009 (in %) – based on the LFS**

![Bar chart showing differences in employment rate between men (M) and women (W) from 1994 to 2009.]

The economic situation of a household is closely connected with the source of income, especially with salaries. Polish women are employed more often in sections of employment in which the salaries are lower. In 2005, the most feminized sections were: health and social work (80.5% women employed), education (76.3%), financial intermediation (67.8%), and hotels and restaurants (64.5%). Only in education, the share of working women increased, whereas in the remaining sections it has slightly decreased. An average Polish woman earns less than an average Polish man – in the years 1996–2002 20.8–16.9 percent points less – and the differences have decreased. The disproportion is bigger among middle-age people (35–44) and the oldest, and among people with tertiary and basic vocational education and lower. The data shows that the median of women salaries was lower in comparison with men salaries by 17.3–11.0 percent point at the same time. More detailed analyses prove that the narrower gap between the median than between the mean earnings suggest lesser differentiation of earnings in women than in men. This could be the result of the fact that women are in the minority in the group of the best-earning members of the Polish society. Taking into consideration features of the representatives of both genders such as level of education, occupation, sector and section of employment, it can be stated that women earn up to 20% – 25% less than men. The scale of the pay gap remains the same throughout the transformation period but is in decrease when compared with the 1980s when women earned even 35% less than men.

**Table 1. Female average gross wages and salaries as % of male average gross wages and salaries by age and education in 2008**

| Age 24 and less | 89.9 |
| 25–34 | 85.8 |
| 35–44 | 80.0 |
| 45–54 | 84.1 |
| 55–59 | 88.4 |
| 60–64 | 85.2 |
| 65 and more | 73.4 |
| Educational level: | | |
| Tertiary | 67.6 |
| Post secondary and vocational secondary | 81.5 |
| General secondary | 85.3 |
| Basic vocational | 71.7 |
| Lower secondary, primary and incomplete primary | 73.9 |
| Total | 83.6 |

In 2009, 56.8% of all women aged 15 and more were outside the labour market. The main reasons for being out of the labour market for this category of women are: family and home–hold responsibilities (app. 30% of the category), being retired and on disability pension (more than 19%) and unemployed.

Figure 3. Unemployment rate by gender in 1994–2009 – based on the LFS

The data from the unemployment registers prove the constant predominance of women among the unemployed (55.1% in 1995, 53.4% in 2005, and 51.1% in 2009) and among the separated unemployed sub-populations who do not have the right to unemployment benefit (59.3%, 55.3%, 57% respectively), out of work for longer than one year (63.3%, 59.0%, 57.2% respectively), dismissed due to reasons on the side of the employer (66.7%, 61.4%, 65.2% respectively). The situation worsens over time without work, and the gender differences adverse for women slightly lessened. In the period 1995–2007 the share of women unemployed for over six months has slightly increased from 32.9% to 36.3% (+3.4 percent points), and so has among men – respectively from 44.6% to 47.9% (+3.3%), whereas the share of unemployed for over twelve months increased – from 42.9% to 50.2% for women (+7.3%) and from 30.6% to 37.8% for men (+7.1%)21.

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The risk of being unemployed and outside the labour market is higher among Polish women than among Polish men in the transition period in Poland, but between 2003–2009 we observe that the process of feminization of unemployment is not clear. The ratio of women’s rates of unemployment and men’s rates of unemployment changes, but in 2009 visibly decreased – to 1.12 and 1.04 (Table 2).

Polish women are over-represented among the population living on non earned source (+ 8.1 percent points), especially among people who live on retirement benefit and social assistance benefit. Polish women are underrepresented among people having incomes from work (-6.0) and incomes from owning a property (-4.0).²²

Table 2. Women’s and men’s unemployment rates and women’s and men’s employment rates (2000–2009)

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate of employment (%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>50.9</td>
<td>52.2</td>
<td>53.2</td>
<td>54.1</td>
<td>57.4</td>
<td>58.6</td>
<td>58.5</td>
</tr>
<tr>
<td>W</td>
<td>38.2</td>
<td>38.5</td>
<td>39.2</td>
<td>39.6</td>
<td>43.2</td>
<td>42.9</td>
<td>43.2</td>
</tr>
<tr>
<td>The ratio of women’s employment rate and men’s employment rate</td>
<td>0.75</td>
<td>0.74</td>
<td>0.74</td>
<td>0.73</td>
<td>0.75</td>
<td>73.2</td>
<td>73.8</td>
</tr>
</tbody>
</table>

²² Own estimation on the basis of table 1 (111); Women in Poland, op.cit., p. 187.
Contemporary Polish Poverty and Gender

<table>
<thead>
<tr>
<th>Rate of unemployment LFS ** (%)</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>18.4</td>
<td>16.7</td>
<td>16.6</td>
<td>13.0</td>
<td>7.8</td>
<td>6.4</td>
<td>7.8</td>
</tr>
<tr>
<td>W</td>
<td>20.3</td>
<td>19.5</td>
<td>19.1</td>
<td>14.9</td>
<td>9.4</td>
<td>8.0</td>
<td>8.7</td>
</tr>
<tr>
<td>The ratio of women’s rate of unemployment and men’s rate of unemployment</td>
<td>1.1</td>
<td>1.17</td>
<td>1.15</td>
<td>1.15</td>
<td>1.2</td>
<td>1.25</td>
<td>1.12</td>
</tr>
<tr>
<td>The share of register unemployed in %</td>
<td>48.5</td>
<td>47.7</td>
<td>46.4</td>
<td>43.5</td>
<td>41.8</td>
<td>43.4</td>
<td>48.9</td>
</tr>
<tr>
<td>M</td>
<td>51.5</td>
<td>52.3</td>
<td>53.6</td>
<td>56.5</td>
<td>58.2</td>
<td>56.6</td>
<td>51.1</td>
</tr>
<tr>
<td>W</td>
<td>1.06</td>
<td>1.10</td>
<td>1.16</td>
<td>1.3</td>
<td>1.39</td>
<td>1.3</td>
<td>1.04</td>
</tr>
</tbody>
</table>

* Data inaccessible

** Labour Force Survey (LFS) covers persons being members of households in dwellings selected on a random basis (excluding institutional households). The survey covered approximately 19 thousand of households in the reference periods. On the LFS basis:


a) the employment rate is calculated as the share of the employed persons in the population aged 15 and more; b) the unemployment rate, calculated as the share of the unemployed persons (total or in a group) to the economically active population (total or in a group). Since 2001 unemployed persons are persons, aged 15–74, until 2000 – aged 15 and more.

Registered unemployed person is understood as a person registered as such in the powiat labour office appropriate for his/her permanent or temporary place of residence and fulfilling the criteria of the Law being in force in a period, including being over 18 and under 60 (women), or under 65 (men) years of age.

4. Does Feminization of Polish poverty exist?

The extent of women’s poverty is estimated with the use of: 1) the rate of poverty among female and male one–person households; 2) the rate of poverty among one-parent families (remembering that in Poland more than 90% of the total number of one-parent families are constituted by lone mothers with dependent children); and 3) the dynamics of the share of one-parent families among welfare client families.

In 2009 female one-person households are in much better material living conditions than male. The share of poor female one-person households among total female one-person household in comparison with such kind of male households
is three times lower using subsistence minimum as the poverty line (2.5% and 5.9% respectively) and two and a half times lower using both relative and legal poverty line (3.5% and 8.6%, 4.1% and 10.5% respectively).23

Data collected by Central Statistical Office (Figure 6) shows that except marriages without children the risk of living in poverty of one-person households is the lowest among all the types of households. Using two poverty lines – subsistence minimum and relative poverty line – the share of the poor among one parents families decreased (respectively 6.4% and 16.0% in 2009 and 6.4% and 16.0% in 2009). Polish incomplete families do not experience high poverty risk because the majority of single mothers (about 65%) support only one child, whereas 25% of them have two children and only 9% of them have three or more children.

**Figure 5. Risk of living in extreme and relative poverty by type of household in 2009**

![Risk of living in extreme and relative poverty by type of household in 2009](image)

Source: *Reports of Ministry of Labour and Social Policy 2009*.

Data from welfare agencies show that in the years 2003–2005–2008 the share of incomplete poor families with dependent children aged less than 24 constituted mainly by single mother household has visibly increased among the total number of Polish welfare families from 12.5% to 13.6% and 15.3% and among the total number of members of these families from 11.8% to 13.4% and to 16.6% (Reports of the Ministry of Labour and Social Policy 2003–2009).

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23 *Women in Poland*, op.cit., p. 208.
Analyses of poverty duration among households of welfare recipients inhabiting large cities led to interesting results. Except for socio-economic status and living in poverty enclave other correlates of poverty perpetuation were found, namely socio-demographic variables showing the poor households' peculiarity in gender perspective such as their structure of marital status and sex of adult household members. Such variables are rarely taken into account in poverty analysis. A composition of welfare recipients' households in terms of sex of its adult members and divorce strongly correlate with a type of poverty duration (VC for feminized households, i.e. for the households which members are women only equals 0.190, whereas for masculinized households, i.e. for those households which members are men only – 0.179; in case of divorced women's households VC equals – 0.238 when p<0.05). Commonly used in poverty analysis structural household features such as whether the family is complete or incomplete, or whether the head of the family is a man turned out to be weaker predictors of temporal patterns of experiencing poverty. Detailed data analysis showed that the perpetuation of poverty coexists with the growth in the rate of:

- incomplete families (that are three times more frequent among permanently poor than among short-term poor);
- female-headed households (that are three times more frequent among permanently poor than among short-term poor);
- divorced women's households (that are 2.5 times more frequent among permanently and chronically poor, whereas complete families are over-represented among short-term poor).

Considering gender of the household member who represents the household at welfare agents, i.e. of the “head” of the household it was revealed that the most perpetuated poverty is characteristic for incomplete families, feminized families and families disintegrated because of a divorce, whereas short-term poverty is characteristic mostly for complete families. Women's relatively lower earnings, higher risk of unemployment, especially combined with having children, should undoubtedly be seen as conditions conductive to perpetuation of economic marginalization especially when women run their household without the presence of an adult man.

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25 Link between temporal patterns of poverty and features such as age and number of children in a family age of adult members of the household turned out to be considerably weaker.
5. Manager of poverty – the feminization of Polish poverty in micro perspective

A relatively new area of research on feminisation of poverty are micro-scale studies on the ways and the quality of poor households’ functioning. Considering gender a vital, family’s economic situation related criterion of the family structurization, it seems inevitable to refer to sociological concept of woman specific family role. Women play fundamental role in a family in times of a crisis caused by unemployment or other misfortunate occurrences. In difficult times it is a woman who organizes the family life, rationally manages limited resources, minimizes spending by performing certain services herself instead of paying for it to someone else, scarifies her free time and intensifies work. When a family experiences financial problems, it is a woman who undertakes actions and strategies to solve them. Mothers and wives tend to reduce their own needs to protect the needs of other household members.

Qualitative analyses of poverty conducted in urban and rural areas reveal unequal gender-based division of home responsibilities and everyday activities among the members of poor families. In poor families, except for the common responsibilities of a wife and a mother (such as cooking, cleaning, child care), a woman overtakes the roles traditionally attributed to husbands and fathers – she organises and secures means to satisfy her family’s needs (looking for a job, applying for social benefits, borrowing money). Women work more hours per day and per week then men. This is a combination of paid or unpaid labour. Women keep their houses prepare food, cook, do laundry, organize food not only by doing shopping but in rural areas also by growing food, tending crops, performing operations as food storage, handling, stocking, marketing, and processing food. Women also handle family’s and personal needs Results of micro-scale studies show that male poverty and female poverty are different.

Women in poor families do not perceive their duties as unequal division of work. Reading the transcripts of interviews one does not get an impression that women complain about their lives, especially elderly women. It is understandable in case of families where adult men are missing, but when men are only responsible for work in fields or when men have lost their jobs and remain unemployed, women are incommensurately burdened with housework which is a symptom of


unrecognised injustice. An important manifestation of feminization of poverty in poor families is unequal access to family resources. Qualitative studies show that women in poor families eat less and worse than the rest of their family, giving better food to their children and husbands. Especially visible is women's limitation of their own needs for the sake of the children. Women refrain from buying clothes for themselves because they want the children to look as other children at school. Female and male poverty described by poor family members is different. Female poverty means being far-sighted, overwhelmed with housekeeping work, worried about the future of the family and ready to sacrifice. Male poverty often means withdrawal from the family life, alcohol overuse and violence.

Table 4. Poverty rates by type of Polish households using subsistence minimum and relative poverty line in 2002–2009 (in %)

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2003</th>
<th>2006</th>
<th>2007</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extreme</td>
<td>Relative</td>
<td>Extreme</td>
<td>Relative</td>
<td>Extreme</td>
</tr>
<tr>
<td>One–person households</td>
<td>2.5</td>
<td>4.6</td>
<td>2.8</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Marriages without dependent children</td>
<td>2.3</td>
<td>4.4</td>
<td>2.4</td>
<td>1.7</td>
<td>1.7</td>
</tr>
<tr>
<td>Marriages with 1 child</td>
<td>4.6</td>
<td>8.5</td>
<td>5.4</td>
<td>2.9</td>
<td>2.9</td>
</tr>
<tr>
<td>Marriages with 2 children</td>
<td>8.6</td>
<td>15.8</td>
<td>10.2</td>
<td>5.2</td>
<td>5.2</td>
</tr>
<tr>
<td>Marriages with 3 children</td>
<td>17.4</td>
<td>29</td>
<td>17.9</td>
<td>10.5</td>
<td>10.5</td>
</tr>
<tr>
<td>Marriages with 4 children and more</td>
<td>37.1</td>
<td>50.7</td>
<td>41.6</td>
<td>25.4</td>
<td>25.4</td>
</tr>
<tr>
<td>Mother/father with dependent children</td>
<td>13.4</td>
<td>21.8</td>
<td>13</td>
<td>6.9</td>
<td>6.9</td>
</tr>
<tr>
<td>Total</td>
<td>11.1</td>
<td>18.4</td>
<td>11.7</td>
<td>6.6</td>
<td>6.6</td>
</tr>
</tbody>
</table>


6. Conclusion

It is not easy to present the phenomenon of women’s poverty in Poland and to find an answer to the question whether the feminization of Polish poverty takes place. **Available data do not allow to formulate an unambiguous thesis about the occurrence of feminization of poverty in Poland.** Results of both quantitative and qualitative studies show various aspects of female poverty and prove that female poverty is different to male poverty, not only in terms of the basic poverty correlates (unemployment, household structure, also marital status and gender of the adult members of the household), but also when it comes to experiencing poverty within poor households.

Consequences of female poverty such as the risk of intergenerational inheritance of poverty make it particularly important. Therefore, it is necessary to find out whether the number and rate of poor women among all women increases or declines; whether this process concerns female-headed households with children or elderly women. Such findings are essential for launching effective social policy actions.

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Contemporary Polish Poverty and Gender


Daly M., Europe’s Poor Women? Gender in Research on Poverty, Unpublished Manuscript, received July 1 1990.


SUMMARY

The present paper addresses the issue of poverty as a gender specific phenomenon actual to the contemporary Polish society. The approach selected for the analysis is based on the concepts of female poverty and feminisation of poverty. The first section of the paper considers the two concepts as regards their origin, development and the present context globally, followed by an attempt to define them. The next sections focus on female poverty and poverty feminisation in Poland and allow for their demographic background, women position on the labour market and the feminisation of poverty in Poland in micro-perspective. The author aims to provide an answer to the question whether poverty feminisation exists in Poland, having discussed exhaustive evidence, from quantitative and qualitative studies, for relevant socio-economic phenomena.

Key words:

Poverty, female poverty, feminisation of poverty, female unemployment, gender
EVERYDAY LIFE IN THE MIRROR OF PHOTOBLOGS.
SOCIAL FUNCTIONS OF PHOTOGRAPHY
IN THE AGE OF THE CONSUMER CULTURE

1. Introduction

The problem I am going to discuss is concerned with the relation between the consumer culture and photography. Does the omnipresent consumer culture of the globalized world change the photography and its social functions? Certainly, the present ubiquity of photographs in the Western society is not a new phenomenon, but my thesis is that in the age of the consumer culture some functions of photography are being modified and new ones are being introduced. The best example of these changes are to be found in photoblogs, in their desire to discover extraordinariness of everyday life.

When asked why they take pictures, people give a variety of answers. The authors of photoblogs are also motivated by a choice of reasons, but in their case the most authentic seems to be the answer used by one of the icons of American photography, Garry Winogrand, who asked why he takes pictures answered that, “I photograph to find out what something will look like photographed”\textsuperscript{1}. This quotation may look like a joke or an expression of impatience of an annoying

\textsuperscript{1} B. Diamonstein, An Interview with Garry Winogrand from Visions and Images: American Pho-
journalist but it is not – it shows that photography is a complex process with its own rationale. Photography is not a purely mechanical/electronic record of reality. **Photography is the result of synthesis: it includes a photographer (his/her craft but also his/her attitude, emotions and thoughts at the moment of picture-taking), the subject of photography and the act of photographing.** This is why each and every photograph is not only a record, a document or an interpretation of the subject but also a record, a document and an interpretation of its creator and an attempt to construct a total view of reality.

In his classic work *Camera Lucida* (1984) Roland Barthes expressed some remarks on the ways photography is socially and culturally constrained. My article shows that, on the one hand, Barthes's conclusion is still valid: photography evades us, absorbs the world, seems to be more real than people and reality and even shapes our life in accordance with the generalized beliefs (frequently represented by the photographs themselves). On the other hand, however, the introduction of digital photography – which reinforced the position of photography among other means of mass reproduction – also implies setting it free from a strict social control and any censorship, because the production of images may be entirely home-made by everybody and it does not require any special skills. In the age of analogue (film-based) photography the things which were photographed and the ways of photographing were for most people conventionalized, socially restricted and under control\(^2\). Now the personal uses of photography are open to new and unexpected inventions, which is also encouraged by the fall of traditional aesthetic values.

The essential conditions for these changes were formed by the introduction and diffusion of the whole new cultural complex of the Internet, mobile phones and – most of all – digital photography. In the course of the last 10 years digital cameras have dominated the market of mass photography. The majority of manufacturers have stopped the production of film cameras and completely change over to digital photography. This applies both to the market of popular digicams and the market of advanced amateurs and professionals. Actually, we can stop thinking about film cameras – digital cameras are undisputed winners.

Let us look at some basic current data. According to the Lyra’s Digital Photography Advisory Service report from 2006, the worldwide digital camera shipments grew to more than 63 million units in 2004 and digital camera shipments were

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\(^2\) My article refers to the vernacular photography only (amateur photography, family photography, tourists photography etc.) but certainly not to more artistic ventures, which by definition seek transgression.
expected to exceed 100 million units in 2008. The forecast was accurate. According to the *Worldwide 2008–2012 Digital Camera Forecast* by International Data Corporation (IDC) digital camera unit shipment was 146 million in 2008 and will grow to over 160 million in 2012. Japanese trade body Camera and Imaging Products Association (CIPA) informed that the total shipments of digital cameras from Japan in 2009 (the cumulative total of shipments from January to December) reached 105.9 million units, exceeding the performance in 2007 for the third consecutive year. CIPA’s forecast says that the camera market will grow 7.8% to 131 million units from 2010 to 2011.

While the technology is an important factor in this process of changes, the transformation of value system of an average consumer and camera user is even more essential. This transformation is tightly connected with the unquestionable triumph of the consumer ideology in the Western societies. The logic of consumerism has a determining impact on a social and cultural role of photography. I would like to emphasize here that **three major characteristics of the consumer culture are:**

1. An individual’s need to act as a free subject – in this context freedom is formulated in terms of individualism. The need to act as a free subject is stimulated by the social surrounding of individuals and it is satisfied by choices made by them – the choices which deal with various goods and services offered by a non-discriminating global free market. Simultaneously, individuals, construct and express their identities, uniqueness and distinction by the power of these free choices and consumption.

2. The freedom of choice is tied with the openness to a cultural variety and frequent alternations of cultural identities. The society which consist of culturally differentiated individuals works only because their cultural identity is mainly shaped by the participation in the mass consumption, i.e. by buying the specified goods and services.

3. A development and expansion of the hedonistic culture based on entertainment and leisure. In the consumer culture the ideal model of life is packed with pleasures, joy, positive experiences. Searching pleasures is the fundamental value and it justifies acts which traditionally would be recognized as immoral, sinful or plainly stupid and irresponsible. The values of the con-

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3. [http://www.lyra.com](http://www.lyra.com) [access: 05.05.2006].
sumer culture has easily devastated other values systems because its great attractiveness results from the fact it accomplishes its promises now and here – no long waiting for the deferred gratification is required.

Gary Cross in his history of modern American consumer society *An All-Consuming Century. Why Commercialism Won in Modern America* noticed that the success of consumerism was possible because of its support for the idea of freedom and democracy. Freedom here is understood in terms of liberation from the old, traditional and a slightly too tight communities and joining the mass society of individualists\(^7\). Consumer goods, including visual media and photography have become the basis for the construction of new – freely chosen – identity. As a result, the role of the photography in the consumer culture is rather increasing than decreasing because it plays an important role is shaping the fundamentals of our social identity.

2. Changes in social functions of photography

Let us come back to photography and consider its present condition. Before I analyse the very special face of photography and photoblogs in detail, let me comment on the relation between sociology and photography and also on the recent and profound changes in photography.

Already in the 1960s, even before the rise of visual sociology, Pierre Bourdieu wrote that sociological interest in a social practice of photography and in the meaning of the photographic image is important and justified. Firstly, because photography is not a matter of chance; secondly, because analysing the socio-cultural factors which define photography can be useful for sociological aims. Bourdieu observes that “from among the theoretically infinite number of photographs which are technically possible, each group chooses a finite and well-defined range of subjects, genres and compositions”\(^8\). In other words, photography is not only a matter of individual and unique imagination but rather a matter of an internalized norm and values of a group. “The most trivial photograph expresses, apart from the explicit intentions of the photographer, the system of schemes of perception, thought and appreciation common to a whole group”\(^9\). Bourdieu thinks

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\(^9\) Ibidem.
that the range of subjects, genres and composition should be seen against the class background, although not only because they also vary with age or sex. The practice of photography and attitude towards photography represented by different groups are one of the aspects of their position in social and cultural structure. Therefore, contrary to popular belief that photography is ruled by anarchy and improvisation, we can safely note that “there is nothing more regulated and conventional than photographic practice and amateur photographs”\(^\text{10}\).

Bourdieu’s conviction that photography is conventionalized is still valid but today we should notice that a class context has a weaker impact. The most important is the context of the consumer culture, which means a specific tyranny of dominant values, but at the same time it gives us some significant margin of freedom. It leads me to an assumption that this duality refers to photography, as well. Photography is affected by the dominant values and represents dominant images but it also represents defiant and alternative images by which society generate its resistance against the dominant iconosphere and seeks the way to liberate from its influence\(^\text{11}\). In the present day the environment of vernacular photography (amateur photography) is shaped by the cultural frame of the consumer society. In this context photography show us the complex Janus-like nature of facing opposite directions: one head looks for subordination to the dominant values of the consumer society and the other head looks for resistance and contestation. I looked for the latter and I have found it in some photoblogs – in their ability to pay attention to the ‘extraordinary obviousness’ of everyday life.

Now we are going to consider major changes in social functions of photography in the age of the consumer culture.

2.1. The total voyeurism as a cultural norm

The proliferation of digital and computer technologies makes it very trouble-free to take pictures of unsuspicious people in the public sphere but also – which is more important – it gives the possibility of showing these files on the Internet, which makes them accessible for everyone. It is so straightforward: one can go to a party or a local swimming pool, the beach etc., take hundreds of “glamorous” photos and publish them on the Internet on the very same day. So without even knowing it everyone can become an object of a fetishistic cult of any kind. So far

\(^{10}\) Ibidem, p. 7.

we have been discussing the public sphere which is quite open but the trophy hunters enter more constrained spheres, too. It is not surprising concerning the fact that spy-like character of new cameras is often emphasized in the advertisements. While surveillance has become the permanent element of our life (we are under the camera's eye on the street, in a bank, a superstore – everywhere) but its motives are different. An invasion into our everyday private life can be, to some extent, justified by security measures but the voyeuristic pictures published on the Internet are a feature of exploitation. The bodies (or their fragments) of anonymous men and women are treated in a purely instrumental way, as commodity. They are virtualized, which means that the “models” do not have any control over their own representation. Consequently, this may undermine the trust necessary for the normal social relations.

2.2. From voyeurism to exhibitionism

One can easily observe that a surprisingly large part of these voyeuristic pictures show the authors – photographers themselves. The voyeurism of some people is combined with narcissism and exhibitionism of others but in this case they are often the same people. A very good example is an interaction between photography and consumption which affects the representation of sexuality in contemporary digital photography. Thanks to this new equipment consumers can become the producers of erotica or even pornography by themselves: for their pleasure or commercial use. Their production can be easily presented and distributed on the Internet – no technological disadvantages of film cameras, no censorship, no fear, no shame! Advertisements of digicams emphasize qualities of a total control and a total manipulation in the hands of the anonymous consumers. Such ads which are quite popular now would not be possible outside the context of the serious change in the consumers’ value system: the glorification of the pleasure, a pleasure quest and permissiveness combined with the myth of individual freedom

Many people make a use out of this promise of a “total control” and “no censorship”. For example, a short survey on the Internet photoblogs and galleries with mobile photo photography shows that people love their own “naughty” photos:

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putting them on their mobile phones panels is quite trendy and fashionable. Teenagers take many nude and semi-nude photographs of themselves and send them away to their boyfriends/girlfriends. The large scale of such visual production makes it a cultural norm or, at least, makes it impossible to recognize it as a simple deviance. A great deal of new users of digicams or camcorders firstly point them at themselves and their partners to take a photo or shoot a film. Moreover, they often do not hesitate to share these images on the Internet. How to explain this phenomenon? I think that artificial shaping of personality and identity through buying goods or services, which is an essential feature of the consumer culture, should be mentioned here. I would like to suggest that the abundance of autophotography (including pornographic ones) is somehow connected with the problem of identity construction. We can read in every handbook of sociology that a social identity of an individual cannot be constructed just like that and on one’s own. This is a relatively long process which requires cooperation of other people who acknowledge and recognize one’s social identity. I think that distributing one’s own images on the Internet can be analyzed as a form of communication. In a proper context this communicational medium activates the mechanism of community and it enables constructing one’s identity even without any physical contact with other people – they can do it exclusively in the virtual reality.

2.3. From the family albums to web albums

It seems that the content and functions of family photography (including family albums) have not undergone any serious changes caused by the digital revolution. Still, we can watch modifications in their form, in the habits associated with looking at photos, with sharing and storing. The family pictures function as an effective and highly emotional way of maintaining and preserving the important social relations. Digital photography only reinforces these functions: thanks to email communication we can share the photos faster and more frequently. One important change I have noticed is the fact that a digital medium is favourable for greater openness. The photos once providently hidden from the eyes of strangers now can be found on the Internet forums, weblogs or WWW home pages. The routines associated with watching photos are different, too. At present, people, especially the younger generation, watch the photos almost exclusively on computer screens and they have a very rare contact with material prints (and even these prints are usually home-made). Photos no longer are stored in family albums or shoe-boxes – now we use hard drives, memory cards, optical discs, and, most of all, an online sharing and storing services, web albums etc.
2.4. New photographers

A significant change in the family photography (and photography at all) was introduced by the emergence of new photographers. Because of the introduction of digital cameras and because of the ideology of consumerism cameras are now more frequently bought and used by women. Technology and machinery were traditionally perceived as men’s domain and even if film cameras were not very complicated, in most cases men were responsible for picture-taking. However, the digital cameras have liberated women’s activity: taking pictures is for free, poor photos can be deleted and many more taken, so let’s the women play with it. The group of new photographers also consist of children and teenagers who are generally equipped with cameras or at least cameras build in their mobile phones. It is too early to evaluate the consequences of this proliferation but they will be unquestionably very fascinating.

2.5. The trivialization of photography

What is the difference between a present-day photos and the photographs which were taken 20–30 years ago concerning the subject of photography? Have the rules of photography regarding the choice of an object and the way it is represented changed? I think the changes are quite serious and deep – they have affected the whole socio-cultural aspect of photography. The changes were triggered off by the proliferation of fully automatic compact cameras (in the beginning loaded with film but now digital ones). One of the most important qualities of images in the contemporary culture is their large or even mass scale, which at first glance seem to be indifferent to any criteria of beauty and aesthetics. The capability of taking pictures was liberated from acquiring skills required by a manual camera, consequently the number of photos radically increased and their quality significantly dropped.

The peculiarity of contemporary photography is that nowadays we can watch the trivialization and devaluation of a subject of photography. People take picture of everything that can be photographed and everything they can see. First, because of the economic factor – digital pictures are almost for free: buying a digicam is a one-time financial effort – taking thousands of pictures afterwards does not require any further investments. Second, because of the crisis of an artistic tradition and the lack of aesthetic authorities which is characteristic of the consumer society. Moreover, the proliferation of the Internet has made it possible to use it as a particular type of a gallery – its specificity relies on the fact that now every photo can appear in public and for free.
Pierre Bourdieu noticed that the very act of photographing confers a special meaning and value on a situation, object or person being photographed. However, this function of photography is possible only when not everything is photographed. “Photographs of major ceremonies are possible because – and only because – they capture behaviour that is socially approved and socially regulated, that is, behaviour that has already been solemnized. Nothing may be photographed apart from that which must be photographed”\(^{13}\).

The most typical exemplification of this function is wedding photography which gives the indispensable social sanction and meaning to the rite of passage and integrates its participants\(^{14}\). Today, this function is no longer valid but the trivialization of the subject of photography should not be automatically assessed as negative because in the works and photo-practices of some new photographers this trivialization transforms into a total photography. Examples of such a shift can be found in photoblogs. By analyzing them we can observe the change in general function of photography which once was uniqueness but now it is mundaneess.

3. Photoblogs – history and basic facts

Photoblogging has increasingly become a very popular mainstream online activity for both amateur and pro photographers. Professionals and amateur photographers use the Internet for creating social networks as well as showing photos to very large audiences.

Photoblogs (or online photo-diaries) have emerged as a part of blogosphere and a subgenre of Internet blogs. Blogs are diaries, chronologically organized web site with text messages that are successively added to the diary. Photoblogs use blog technology to publish pictures instead of words (“photo” + “web” + “log”) – even if they use words, pictures are the main focus (photographs are substituted for a text message or a part of a text message but most photoblogs have some verbal content as well as pictures). It makes no sense to define how many photos it takes

\(^{13}\) P. Bourdieu, op.cit., pp. 23–24.

\(^{14}\) One can observe that this trivialization of the subject matter of photography is not always accompanied by the trivialization of photographing per se, which is still perceived as an important part of many ceremonies. See: J. Lubos-Kozieł, *Ona stoi, on siedzi oraz całe mnóstwo innych możliwości. O studyjnej fotografii ślubnej i przyczynach jej popularności* [She is Standing, He is Sitting, and a Whole Lot of Other Possibilities. On Studio Wedding Photography and Reasons for Its Popularity], "Ikonosfera. Studia z Socjologii i Antropologii Obrazu" ["Iconosphere. Studies in Visual Sociology and Anthropology"] 2006, Vol. 1, http://www.ikonosfera.umk.pl/index.php?id=45 [access: 23.09.2009].
to change a blog into a photoblog – usually it is obvious if we deal with a blog or a photoblog, but the most important and crucial factor is the definition of situation accepted by the author. When we cannot find such a self-definition the decisive question is about autonomy of images: do photographs in a photoblog function as independent and self-sufficient message or maybe their function is purely illustrative/decorative? The site www.photoblogs.org, one of the photoblog service websites, defines photoblogs in this way: “A photoblog is a type of blog that is regularly updated with photos. Some photoblogs focus only on photography, while others have photos in addition to other content. All photoblogs, however, consider photos to be an important part of their chronological blogging structure”\textsuperscript{15}.

When did first photoblogs appear? The first web pages which served this function (although they were not called photoblogs) emerged in the middle of 1990s together with development of WWW home pages and proliferation of the Internet. Photoblogs in the proper sense appeared as soon as there were technical possibilities of displaying images to audiences (WWW browsers, user-friendly software and fast transmission). The proper photoblogger’s movement (photoblogging) started at the beginning of the third millennium together with first specialized photoblog services and providers, as well as software for editing, uploading and updating the photoblogs. They do not require any special computer or software skills. The first Polish photoblogs emerged in 2002. The good example is http://www.bartpogoda.net which evolved from a text weblog. Photoblog catalogues such as http://www.photoblogs.org have started in 2002 – they catalogue and classify photoblogs according to various criteria\textsuperscript{16}. Photoblogs are so abundant that it is more and more difficult to find projects that are unique, creative, imaginative so such catalogues play a very important role.

How many photoblogs are there? Without doubt there are a lot of them but it is very difficult to estimate their number. According to http://www.photoblogs.org in April 2011 there were more than 40,000 registered photoblogs all over the world (a few hundred in Poland) but these are only selected photoblogs which fit criteria of the catalogue – there are much more unregistered ones. When we look at statistics of the biggest photoblogging service http://www.fotolog.com (April 2011), we can see very impressive statistics: 32 291 931 registered photoblogging accounts in more than 200 countries, 929 541 005 uploaded photographs, 37 537 photographs uploaded during one single per day (April 14, 2011).

\textsuperscript{15} http://www.photoblogs.org/faq/ [access: 10.01.2009].

\textsuperscript{16} See: http://wiki.photoblogs.org/wiki/Photoblogging_History [access: 27.08.2006].
It is very not possible to accurately estimate the total number of photoblogs and the same thing applies to Polish ones. As I research Polish photoblogs I think that the statistics from http://www.photoblogs.org presented above is somehow incomplete and underestimated. Polish site http://www.fotolog.pl informs about 21048 photoblogs registered in Poland (April 2011). The other Polish blog-provider http://www.photoblog.pl assesses there are a 100 thousand photoblogs which seems to be overtly overestimated, because photoblog service providers prefer such a triumphant way of guesstimate (higher numbers increase the attractiveness of the site for advertisers). Besides, one should remember that every day there are many new photoblogs added to the blogosphere and, at the very same time, many established ones are not updated anymore, so there are many “dead” photoblogs out there as well.

At the beginning of their history the development of photoblogs was limited by slow Internet connection and expensive digicams. The heyday of photoblogs correlate with a cheap broadband Internet and affordable digital cameras. Such a relation and the impact of technological advances is not new in the history of photography. When George Eastman introduced the hand-held Kodak camera in the 1880s he made photography accessible. Cameras such as famous “Box Brownie” were manufactured in millions and sold for about quarter of an average week’s wage. The facts that photography has become much cheaper and much easier (“you press the button, we do the rest”) affected the way people use photography, i.e. people interested in recording life moments, which would otherwise require a professional photographer, were offered a new tool.

The relocation of cameras from photo studios, where they were usually used for serious fine art projects, portrait or still life photography, meant that they have become available for average people who take photographing into their hands and use it to preserve important and less-important moments in their life: family celebrations, picnics, holidays. It would be impossible with pre-Kodak heavy and bulky cameras loaded with fragile glass plates: easy to load rolls of film changed everything and started a new era in the history of photography.

Undoubtedly the proliferation of cheap digicams caused a similarly dramatic change in the practice of photography. The real simplification of taking pictures, decrease in costs and new possibilities of sharing pictures made all photographers look for new objects of photo-interest. They aim their lenses at these aspects of

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their life and their reality which in the pre-digital photography, as a rule, were not photographed (or they were very rarely photographed). So we have moved from the studio photography, through occasional photography, to the era of total photography. The total photography is interested in everything – in everyday life and trivial activities, in all facets of life which are not always exciting and unique altogether, because mostly they are mundane, routine and dull procedures (what one has for dinner, a book one is reading, people in the subway, passing cars). However, at the same time, these trivial and mundane elements of everyday life create a fundamental dimension of human life – they all are integral parts of life as such. Photoblogs endeavour to give us a direct, unmediated, emotionally based experience of life as it is in all its manifestations. The power of a photoblog does not rely on the uniqueness of individual photographs, but rather on the totality of experience it delivers. It seems that photoblogs work this way even if some photobloggers declare a high level of selectivity. It is so because their criteria are not the exceptionality and rarity of the image but authenticity of a personal signature.

4. Photoblogging as exploring the everyday life

During my research on photoblogs many times I have run into a very specific thought which is to be found in the statements of photobloggers.

My photoblog is a report about reality I observe. Photography means for my new experiences and photoblog gives an account of it. The most important thing for me is to create a visible report and build a particular atmosphere in my frames, unique and characteristic only for my worldview. A frame is an image in which I can paint a photograph with the light.

For me my photoblog is 100% me, not some unreal “who is this?” – just me, my joy and sorrow, my laughs and tears, emotions and lack of emotions…

In the beginning the photoblog was an idea how to spend some time, but now this is a part of my soul.

Let there be life, everyday life, and you in the photoblog. Photoblog is my own small world :) My photoblog is my life!

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18 The statements and comments of Polish photobloggers, which I quote in this article, were obtained during my research on photoblogs. They were expressed in my email contacts with the authors, in a questionnaire I sent them and in online discussions in the following online posts: Fotoblog. Fotografia. Sztuka [Photoblog. Photography. Art], http://ffb.pl/forum/viewtopic.php?t=42&sta
These comments show that photoblogs can be seen as a personal chronicle of the present time, a form of communication, an individual diary, but at the same time they can be seen as a social artifact, a product of author’s social environment. Taking photos is a social process, a part of a life-world, which accompanies us on almost every occasion – both everyday and unusual activities. By recording the images of the world, which surround us, photobloggers create a very special diary which allows them to preserve the passing reality of the world and things that seem to be trivial or mundane. The diary is at the same time both individual and collective. Moreover, the majority of people do like recollecting memories because our memory defines us in a more meaningful way than present or future activities which importance are unknown. What is also very significant this record of memory is always directed towards other people: “I want to pass on the image, the moment which has just gone through the lens of my camera. My city, my streets, friends and strangers who I meet, the aura of a small town, which is very boring sometimes, and a very beautiful place I am living my life”.

Sharing photos and reviewing them alone is not enough to satisfy the definition of a photoblog – such goals could be achieved by using popular photo-sharing sites such as Flickr, Picasa, SmugMug, ImageShack and web albums. The quality that distinguishes a photoblog is the blog formula, a function of a diary and a documentary. Photobloggers often put emphasis on the fact that in dealing with elusiveness of everyday life their photoblogs try to overcome the fading memory, save ephemeral moments, be a testimony to the truth of growing-up, changes around them and within them, changes in their view on reality. When we watch their sites we can discover private worlds of people who are either very similar to us or completely different, but nevertheless, getting in touch with them gives us pleasure and satisfaction, even when their photoblogs show unexciting face of everyday life.

Photobloggers want their photographs to be interesting, diverse and technically correct but these are not the most important criteria of success. What is more vital is a personal message and catching the right moment: “when I am in a spe-
cific mood – good or bad – I may want to share it. I look for a proper image by which I am able to express my emotion. When I find it I record it, save as jpg and upload on my photoblog”; “I do not choose particular images for my photoblog but I do know my photoblog pictures are very different from the ones I am taking in my job assignments. Photoblog’s pictures are usually simpler – they do not have to be perfect but they have to be the record of time”. Let me use a metaphor from the art world. A photoblog is unlike a big oil painting, it is rather a modest sketchbook that helps to share simple joys and details. This sketch-like quality of a photoblog is compensated by the engagement, enthusiasm and authenticity. Photoblogs help us to “tame the world” or snuggle up to the world. One of the photobloggers noticed that it is important to differentiate between “everyday photos” and “photos taken every day”: the idea of a photoblog is to publish mundane photos – not necessarily upload photos on a regular basis.

The photobloggers’ inclination to record moments of time and various details around us can be seen as a kind of return to the historical roots of photography and cinema when moments of everyday life were saved and preserved: a view from a studio, a passer-by, a working gardener. Photoblogs and digicams are wonderful tools for anybody in a pursue of new forms, experiments, but also in giving attention to things that are usually unnoticed.

5. Total photography

The photographs of what photobloggers appraise so much and call “the everyday”, the “trivial” and the “mundane” should not be confused with conventional family, holiday or wedding snapshots. Photobloggers are not interested in this kind of the everyday and mundane moments. They want to show “the real life” and how they experience it. This outlook on photography was also discover in Chris Cohen’s research on photobloggers, “Real life, photobloggers say, traditionally happens outside of photographs, and this is precisely what they want in their photos”\(^{19}\). So photoblogs should be interested in “the real life” which is not shown in “traditional” photography. Therefore, when they take pictures of themselves, their friends and strangers they usually do non use flash, they avoid posing (unless its a self-reflective or ironic pose). In order to achieve this goal they employ different techniques: they use “undercover” photography, work by surprise, shoot from unu-

sual angles (LCD screens of digicams make it very easy), use reflections – all these to show the truth about people and the world.

Chris Cohen also notices a very intriguing and unexpected (even paradoxical) relation between pursuing the real life and digital photography\textsuperscript{20}. According to photobloggers it is the digital photography that makes it possible to discover and explore “the real life”! “The fact that digital photographs are free (once the camera and accessories have been purchased) allows photobloggers to take more photos, to experiment and play in a way they rarely did when paying for film processing. What they tend to do under these expanded conditions – and I think this is an interesting and non-obvious choice – is take more photos of what they call “real life”: life as it happens, the small stuff, an intriguing signpost, the stages of construction of a new building, the Thames at low tide, a strange effect of lighting. This behaviour appears to invert a strong claim often made about the digital and its supposed virtuality: namely the claim that the digital introduces a disconcerting fissure of virtuality and indeterminacy into the Real and into our realities. If a photograph is digital, the story goes, how can we tell if it’s been altered, if irrealities have tainted the photograph’s realities? With photoblogging practices, conversely, the digital prepares the field for the introduction of the Real, for the introduction of ‘real life’ into photography”\textsuperscript{21}.

What is the characteristics and profile of Polish photoblogs? Polish photoblogs, exactly like all photoblogs, present the worlds of particular photobloggers which they want to share with viewers. How does these worlds, creations of photographs, look like? How photobloggers perceive the reality? Most of the pictures are street life photography that captures life on the spot. Photobloggers are especially interested in their immediate surroundings – the reality of gray and ugly block of flats, untidy gloomy backyards, poor and neglected neighborhoods. Poland represented in their photographs is quite different from Poland usually seen on TV – this is not a country of colourful malls and smiling, successful free-market winners. It is different and more real because there are real people living their lives not some virtual models made of pixel and plastic. I suppose that this gloomy grayness is so popular because it functions as a reaction to sugary images in mass media. In

\textsuperscript{20} This remark is very important because of the heated discussion among the theorists on whether digital means “death” to the truth of photography and how the real is allegedly undermined by digital photography (more on this topic, see e.g. K. Olechnicki, Fotografia cyfrowa = śmierć fotografii? [Digital Photography = Death of Photography?], “Camer@obscura. Historia, Teoria i Estetyka Fotografii” [“Camer@obscura. History, Theory and Aesthetics of Photography”] 2007, No. 3–4; K. Robbins, Into the Image. Culture and Politics in the Field of Vision, London–New York 1996, pp. 149–153).

\textsuperscript{21} K.R. Cohen, op.cit., p. 888.
the panorama of human types photobloggers are sympathetic with people from the margins of our society, with those who are unwanted and excluded from a happy capitalism of the consumer culture. The most imposing impression from watching these pictures is the sense of visual roughness and harshness of Polish reality, which is very directly experienced by photobloggers.

These photoblogs do not represent the impartial look of an anthropologist, neither the curiosity of a collector. This is a voice (or rather a vision) of a “native” who has to survive within this hostile social ecosystem. Young people, who are the most active authors of photoblogs, send us a clear message and a critical view. The visual reality they document annoys them so they show their negative attitude towards it, but at the very same time they try to cope with it. The most popular way of managing the reality is dividing it into two parts: one is a hostile sphere of the city, street, neighbourhood; the other one is a cosy haven of one’s home, family, closest friends, favourite pets. The public sphere is confronted with the private sphere but thanks to a photoblog this is not a complete closure in the shell of home, because this privacy and even intimacy is very often publicly exposed and shared. The photographs which show the authors’ life, emotions, intimacy – may be seen as ambivalent. Sharing such representations can be dangerous, too, because it may cause some hostile feedback from the environment. However, as one photoblogger has said, showing one’s life gives a chance for a meeting with another person, so it is worth trying because a photoblog is “a diary with a function of communication”.

6. Conclusion: photoblogs and profits for sociology

The proliferation of photography in its newest form (digital photography) has many consequences but it definitely means that people are taking more photos, in fact, without any limits concerning the subject. This can be and should be used by sociology, particularly by visual sociology and sociology of everyday life. The prevalent practices of sharing the photos on WWW home pages, galleries, photo-sharing sites and photoblogs give sociologists a fantastic opportunity – an access to private worlds of people, worlds closed for a conventional investigation. Photographs are as important personal documents as letters, diaries, journals – they can

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22 The average Polish photoblogger is a young person, usually 15–35 years old, who lives in a city with 50 000 thousand inhabitants or more, with at least high school education (very often, 50%, have higher degree). Men photoblog more often than women but the difference is very small (this characteristic differentiates photoblogs from weblogs, which are usually more often written by women).

23 http://danieluk.net/fotoblog/ja.htm [access: 08.01.2006].
be used as empirical data and evidence. In such a case visual sociology cooperates with a biographical method. According to Rafał Drozdowski this cooperation relies on using visual documents in many ways\textsuperscript{24}. Photoblogging can be treated as a contemporary version of Mass-Observation Project\textsuperscript{25}, which is even more useful for sociologists since people with digicams are everywhere and anytime.

**Photography is a universal language which is very often used instrumentally, even abused, but can also become a tool used to learn about the world, a tool of creation, a tool of human integration and a tool of resistance against dominant cultural aims.** Even if the majority of pictures uploaded on the Internet demonstrate the popularity of a voyeuristic and exhibitionistic attitude built on consumerism, there are still some photoblogs which use personal messages and personal images for self-development and communication with others, rather than narcissist self-advertisement. As we can see the “dark side” of the contemporary photography, which is dominated by the consumer culture, is accompanied by the ‘bright side’ of photography, which in this cultural environment can use the margin of freedom guaranteed by the very same consumer culture.

Howard Becker has drawn a parallel, popular among the visual sociologists, between sociology and photography. He says that they both were born almost the same time: 1837 – the 4th volume of Comte’s *Cours de philosophie positive* was published; 1839 – the daguerreotype was invented, and they also shared a very important common denominator: the will to explore society in a total way and conviction that is absolutely possible\textsuperscript{26}. As we know from the history of sociology a very deep discord soon happened for the reason that sociology was aspiring to become a “real” science and photography was defining its goals within the context of fine arts. Now, sociology and photography are very close once again: they have realized that the most uncommon thing is common life.

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**SUMMARY**

The article aims to analyse the relation between the consumer culture and photography. The analysis begins with presenting a wide context of changes of social functions of photography (both technological and ideological). The changes include voyeuristic and exhi-
bitionistic trends among the photographers, transformation of family photography, emerging of new photographers and last but not least the trivialization of photography. All these changes are discussed with a reference to a new photographic phenomenon – photoblogging. The paper presents its history and basic facts and then assumes that some photoblogs implement the project of a total photography which is achieved by exploring the everyday life. Finally, the article offers a perspective on profits which sociology can gain by surveying the world of online images.

**Key words:**

Photography, sociology of everyday life, visual sociology, photoblog, consumer culture
STATEMENTS–DISCUSSIONS

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QUALITY ASSURANCE SYSTEM IN BULGARIAN HIGHER EDUCATION – DEVELOPMENT OR STAGNATION?

1. Introduction

As the key instrument of the Bologna Process – the European reform of HE system – one ought to assume co-operation in education quality assurance. The QA procedures serve to evaluate, monitor and improve what has been achieved by the reform. It is also the basic instrument of standardisation, marketisation and internationalisation of the European higher education, and a fundamental condition for increasing mobility and interest of students from outside Europe\(^1\).

The very concept of quality is obvious to incite positive associations and it would be hard to find a person who would claim that they do not support the idea of improving the quality of education. However, it actually has various meanings in different groups of actors connected with higher education. The above objectives determine its specific definition, though. Within the Bologna reform, the dominant attitude is the one referring to managerism and it depends on building the culture of quality in organisations, providing clear information for the recipients of education services and developing competitiveness on this market. It is essential

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here to make HE institution liable for its academic activities to patrons and sponsors, that is the so-called accountability\(^2\) of the institution.

Within such a perspective, various stakeholders may define their expectations of the HE system in different ways. However, at European universities, quality is still perceived in a traditional manner. Quality as perfection – the perspective which is closest to academic staff – ought to be an immanent characteristic of a university, guaranteed by academic community and which does not require any formal monitoring or specialised quality assurance systems. Here, the highest standards are not defined by means of indicators or criteria; they are something undeniable and obvious. In such an exclusive attitude, it is the professors who determine who and what they will teach, what features, knowledge and refinement ought to characterise an educated person\(^3\).

The traditional meaning of quality is difficult to sustain in the context of the massified higher education. This sector, more and more strongly annexed by the politics and economy, has to prepare graduates to enter the labour market. Thus, quality is co-defined by a number of stakeholders such as students, government, employers, the economy. Such distribution of stress definitely limits the power of the academic staff and positions them in a new role. Strong emphasis on implementing systems of quality assurance in higher education, so typical of the Bologna Process, is not solely a technical change but an attempt to transform the academics’ identity, which obviously has to arouse opposition\(^4\). Still, in spite of considerable limitations, it is the academic staff who are mainly responsible for the quality of education. Therefore, it is so important that they know, understand and accept the QA mechanisms implemented, which determines their usefulness.

2. The Bulgarian higher education system

Similarly to other countries of the region, in the last two decades Bulgaria has experienced many changes within the area of higher education. The most evident was massification. In the institutional dimension, it has occurred mainly within

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the HE institutions. Until 2004, 100 new faculties were established; the number of fields of study and specialisations increased from 150 to 490\textsuperscript{5}. The number of HE institutions rose from 38 (1989/1990) to 43 (2008/2009)\textsuperscript{6}. Two public HE institutions were liquidated, and 7 private ones, which could appear only after 1989, were established\textsuperscript{7}. Also, there has been a considerable increase in the number of students. Massification took place here in a short period of time already in the early 1990s. While in the academic year 1989/1990 there were 127,000 students, twenty years later 274,247 students were registered\textsuperscript{8}. However, the scholarisation rate in Bulgaria is not high if compared to the rest of Europe. In the age grade 20–29, around 20\% attend HE institutions\textsuperscript{9}. Still, a bigger problem for the Bulgarian HE institutions is demographic low and, more and more strongly experienced, shortage of students.

The massification of the number of students was not accompanied by a proportional increase in the academic staff. During the period of 20 years, a slight decline could be observed in the area: in 1990/1991–23,663; in 2008/2009–22,627\textsuperscript{10}. The Bulgarian academic staff fails to reproduce, the majority of the persons are over 50 years of age, which is mainly due to low salaries\textsuperscript{11}. Consequently, academics usually work in several schools dispersed around the entire country. Low salaries have also become one of the reasons for the development of corruption in the Bulgarian higher education, which was diagnosed as a systemic phenomenon\textsuperscript{12}.

In spite of the educational boom, the funds for higher education have been reduced. In the last two decades, they have oscillated around 0.6–0.8\% of GDP\textsuperscript{13}. In Bulgaria, for the education of one student in public HE institutions around USD


\textsuperscript{6} This number does not include colleges that offer incomplete higher education until baccalaureate; they are now 10, cf. next note.

\textsuperscript{7} Национален статистически институт, Образование в Република България, 2009, София 2009, p. 68.

\textsuperscript{8} These numbers include college students who are c. 8–10\% of the entire population, cf. note 6.

\textsuperscript{9} Bulgaria is a relatively small country, with the population of 7.7 mln. Население, Национален статистически институт, http://www.nsi.bg/otrasal.php?otr=19 [access: 24.01.2011].

\textsuperscript{10} Ibidem, p. 81. The average ratio of the number of academic teachers to students is positive, 1:10. However, it varies depending on HE institutions and fields of study. For example in faculties of law and economics it is 1:40.

\textsuperscript{11} In 2008, only in four HE institutions the average salary exceeded € 500. Д. Колева, Заплатите в 4 вуза прескочиха летвата от 1000 лв., Сега, 10.03.2009.

\textsuperscript{12} Г. Димитров et al., Антикорупция/Антиобразование. Изследвания върху корупцията във висшето образование в България, София 2005.

\textsuperscript{13} Ch. Geiselmann, J. Theessen, Adult Education and Education Policy in Bulgaria, Bonn 2007, p. 115.
1,521 is allocated\textsuperscript{14}. Those conditions have had a negative impact on the quality of education, academic staff salaries and the material situation of the schools. Still, the financial autonomy of the Bulgarian HE institutions is high. They are not held accountable for the funds allocated despite the fact that the funds are not sufficient\textsuperscript{15}.

Higher education in Bulgaria is paid. The fees are not high, though they systematically rise. The tuition fee varies depending on the level and field of study. On average, it is € 200–500 for the academic year\textsuperscript{16}. The rates (brackets) of fees are set by the Council of Ministers.

The supervision of higher education in Bulgaria is so much centralised that a number of specific tasks, such as setting the tuition fees amount, the number of students admitted to particular fields of study, or application requirements, lies within the competencies of the Council of Ministers. However, the state does not influence the HE institutions directly through instructions, or defining tasks and aims, but through meticulous regulations included in legal acts that form a tight bureaucratic frame. The issue here is the bureaucratic-oligarchic model which hinders the development and transformation of the higher education system\textsuperscript{17}.

### 3. Theoretical and methodological basis for the study

The starting point for the study were theoretical considerations on institutional change. Similarly to M. Federowicz, it has been assumed that institutions are of a dual, two-aspect nature, and are characterised by their:

- **formal dimension** – legal regulations, terms and conditions, agreements, etc., and
- **informal dimension** – internalised, shaped by culture, manifested as ways of conduct, mentality, habits, tradition, which are very difficult to change\textsuperscript{18}.

\textsuperscript{14} Образование в Република България, 2009, op.cit., p. 77.
\textsuperscript{16} Постановление Но 104 на МС..., op.cit.
\textsuperscript{18} M. Federowicz, Różnorodność kapitalizmu. Instytucjonalizm i doświadczenie zmiany ustrojowej po komunizmie [Diversity of Capitalism. Institutionalism and Experience of Political Transformation after Communism], Warszawa 2004, p. 120. The author relies on the earlier findings by North who divided institutions into the formal and informal ones, thus the terminology used in the paper, assuming that this is an analytical attempt. I accept Federowicz’s interpretation: institutions consist of
The actual change occurs when the two dimensions undergo transformation. Formal institutions are accepted at the informal level or formal institutions are a result of certain processes at the informal level. Hence the actual institutional change is almost always a long-term process. On the other hand, the imposition of formal institutions may result in an apparent change, that is, in this case, in a lack of change at the informal level.

Typically, contemporary changes, also the educational ones, begin with the introduction of new formal solutions, which does not mean that they incompatible with the expectations of the actors, e.g. teachers, who function in the same institutional context as the legislators. The Bologna Process generates here, though, a new extra-national level at which formal guidelines for the reform are created. According to M. Kwiek, challenges within the Bologna Process are an additional burden for higher education in countries of the former Eastern Bloc which have not yet dealt with problems that are legacy of the former system and the political transformation period\textsuperscript{19}. Thus, the study was to answer the question about the adjusting of the Bulgarian quality assurance system to the external Bologna guidelines and to the internal institutional context.

The study was divided into two parts. In accordance with theoretical reasons, it covered both the informal and formal dimension of the implementation of QA system in Bulgarian higher education.

The object of the analysis of the formal institutions was the Bulgarian Higher Education Act and documents including criteria sets formed by the National Evaluation and Accreditation Agency. In the analysis, two matrixes were used. The first were Standards and Guidelines for Quality Assurance in European Higher Education Area (ESG)\textsuperscript{20} which the national QA systems ought to be ultimately harmonised with.

The second matrix was the model Phases in Quality Assurance System Development\textsuperscript{21}. According to it, a criterion for building QA system are problems within higher education. They determine the objectives and instruments of the system.

formal and informal elements which mutually determine each other. Moreover, changes to formal institutions are triggered by people, that is, the carriers of the informal dimension of institutions.


\textsuperscript{20} Standards and Guidelines for Quality Assurance in European Higher Education Area, Helsinki 2005. The document was prepared mainly by the European Association for Quality Assurance in Higher Education (ENQA) for the needs of the Bologna Process.

The first two phases are technical. By means of accreditation, the QA system monitors programmes of studies which fail to comply with the basic standards. Overcoming these difficulties leads to a question about financial efficiency of a HE institution, then about its accountability, innovativeness, its ability to internally develop the culture of quality, and finally about its transparency as an entity offering certain services to a certain group of consumers. Thus, in the next phases, the accreditation is replaced with evaluation, and then with audit, which investigates internal HE institution mechanisms connected with quality assurance. Along with the development of the culture of quality, the HE institutions which take over the responsibility for the level of their services gain more people's confidence. Details on the perspective of the next phases of QA systems development are presented in Table 1.

**Table 1. Phases of quality assurance system development**

<table>
<thead>
<tr>
<th>Problems</th>
<th>Objectives of quality assurance system</th>
<th>Sources of information</th>
<th>Type of external monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1: Serious doubts pertaining to standards of education</td>
<td>a) Identifying programmes of study which fail to comply with minimum standards</td>
<td>Descriptive reports Performance rates</td>
<td>Conclusive; Accreditation, standards monitoring Report for the government</td>
</tr>
<tr>
<td>Phase 2: Doubts pertaining to efficiency/profitability of HE system and/or HE institution</td>
<td>a) Accountability b) Developing awareness of quality in HE institutions</td>
<td>Descriptive/strategic reports containing a) performance b) procedures</td>
<td>HE institution rankings One report for the government and HE institution Identifying good practice</td>
</tr>
<tr>
<td>Phase 3: Doubts pertaining to innovation potential and ability to create internal QA systems</td>
<td>Stimulating the possibility to use internal regulations of HE institution Accountability</td>
<td>Reports containing self-evaluation of: a) procedures b) performance</td>
<td>Audit report for: – the HE institution – the government</td>
</tr>
<tr>
<td>New challenges: Insufficient transparency of HE system</td>
<td>Regulations of the market, e.g. informing consumers (students, employers)</td>
<td>Performance rates as regards “production” (of knowledge and graduates’ skills)</td>
<td>Publishing comparisons of performance rates Standardised graduates assessment</td>
</tr>
</tbody>
</table>

Informal institutions have been operationalised as the expectations of Bulgarian academic staff of the system of quality assurance in higher education. In the course of in-depth interviews, the topics concerned pertained to the condition of Bulgarian higher education, its problems and the respondents’ knowledge and opinions on QA. The interviews were conducted with 23 academic staff members of the Sofia University. They were representatives of humanities, both junior academics and senior researchers. Also, the analyses covered the interview with professor Ivan Panaiotov, the President of the Bulgarian National Evaluation and Accreditation Agency (NEAA).

4. Difficult beginnings

A project of an act implementing mechanisms of evaluating the quality of HE institutions and other research entities was created already in 1993. It was a period of a great autonomy of HE institutions and the project was rejected. The prevailing chaos and the state’s urge to regain supervision ultimately led to the passage of a new act: Higher Education Act, in 1995 and the establishment of the National Evaluation and Accreditation Agency (NEAA).

Also in 1995, the International Higher Education Support Program, whose key module was quality assurance, financed by Phare, began to be implemented. Similarly to many other beneficiary countries, Bulgaria wanted to modernise its HE system, reach the European standards. This has to be assumed as another important reason for the establishment of the Agency.

In Bulgaria, the western experts connected with the program attempted to implement their own vision of education quality assurance, based on, among other things, the assumptions about making NEAA independent from the state authorities, supporting self-governing initiatives of the academic community, focusing on audit and evaluation and not control, developing HE institution systems of

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22 The Sofia University is the biggest and oldest HE institution in Bulgaria whose academic staff support most of the remaining institutions in the country, usually working in more than two positions.

23 Национална агенция за оценяване и акредитация.


quality assurance\textsuperscript{26}. There was no success due to the discrepancy of the vision on QA represented by Bulgarian authorities who wanted control and central regulation of the HE institutions activities\textsuperscript{27}. However, the situation was also affected by cultural determinants: academic community attitude, its mentality, customs\textsuperscript{28}.

In 1999, yet before the signing of the Bologna Declaration, the amendment to the act had increased the state’s control of HE institutions, among other things, through regulations referring to quality assurance. According to the Declaration, the document was to promote Bulgaria’s adaptation to European Union structures and the adjustment of the national education to western trends. Subsequent alterations relating to quality assurance have always been made in reference to the standards of the Bologna reform that was beginning at that time. \textbf{Thus, how has the quality assurance system developed after 1999, being a result of the external Bologna guidelines, the state’s interests and academic staff’s expectations?}

5. QA formal framework

According to the President of NEAA, the modern quality assurance system in Bulgarian higher education was shaped in 2004 at another amendment to the act. However, it actually depends on three assumptions which had determined legislature changes of 1999. These are:

a) accreditation as the basic instrument of QA,

b) the priority of institutional accreditation over program accreditation,

c) NEAA as the sole, governmental agency to monitor the compliance of HE institution’s activity with law\textsuperscript{29}.

\textbf{Accreditation as the basic instrument of QA}\textsuperscript{30} was given a lot of attention in the amended act of 1999. The separate chapter with the title which – also today – is \textit{Accreditation of Higher Education Institutions}, explicitly defined the type of procedures. Although now NEAA occasionally uses evaluation and benchmarking, still the key instrument is accreditation. Its definition has been changing for the last 10

\textsuperscript{26} Р. Пранчов, Блияние на международните проекти по програма ФАР върху висшето образование в България [in:] Университетска автономия и академична отговорност, П. Бояджиева (ed.), София 1999, p. 153.

\textsuperscript{27} “Бюлетин” 1998, No. 1, pp. 5–6, 8.

\textsuperscript{28} Д. Биллинг, op.cit., pp. 159–167.


\textsuperscript{30} In this section, the following documents are reference: Закон за висшето образование, Министерството на образованието, младежта и науката, http://www.minedu.government.bg/left_menu/documents/law/ [access: 24.02.2011]; “Бюлетин” 2009, No. 16.
years or so, though, it has only been softening of the form of communication. Unchangeably, accreditation remains an instrument of monitoring the compliance of HE institution’s activity with legislature and the fulfilment of minimum criteria. Its results determine the amount of budget funds, the authority to grant degrees and the possible number of students admitted, which is set by NEAA. Hence, quality assurance system is defined here at the lowest technical level. It focuses on ensuring basic educational standards which are in fact the main problem of the Bulgarian education system.

The rule of the priority of institutional accreditation was also implemented by virtue of law. It means that fields of study and specialisations are evaluated no sooner than the HE institution has obtained positive note by NEAA\textsuperscript{31}. It is an unconventional solution. Also, it seems unreasonable in the face of the problems that are besetting the Bulgarian higher education. The concern about basic education standards requires, above all, monitoring at the level of programmes and fields of study where improprieties emerge, as in the case of Bulgaria\textsuperscript{32}. According to the model of \textit{Phases of Quality Assurance System Development}, it is only when HE institutions have developed complex and reliable internal systems of quality assurance, the external evaluation, usually audit of those internal procedures, is gradually limited to the entire HE institutions. It is necessary that an institution has strong confidence of external stakeholders, especially the state. Such a situation is out of question in this case as, since 1995 in Bulgaria, the state’s control in the sphere has been successively increasing.

In the beginning, as the result of a solution accepted, the biggest HE institutions almost ignored accreditation. In this way, they protected the fields of study and specialisations that were developing dynamically but often improperly, knowing that they are too important actors to have their legal authority to operate questioned\textsuperscript{33}.

Moreover, Bulgarian HE institutions have no internal quality assurance systems which would be responsible for monitoring education at particular faculties. Since 1999, HE institutions are obliged by law to develop their QA procedures\textsuperscript{34}. However, as the analysis of websites of four biggest Bulgarian universities showed, they have only individual elements of such systems and they do not publish reports on

\begin{itemize}
\item \textsuperscript{31} Закон за висшето образование 1995, 1999, op.cit.
\item \textsuperscript{32} Д. Бучков, op.cit., р. 37.
\item \textsuperscript{34} Закон за висшето образование 1995, 1999, op.cit.
\end{itemize}
their activity. According to S. Slantchev, it is the issue of fiction and lack of academic staff’s confidence in such solutions.\footnote{S. Slantcheva, op.cit., p. 181.}

The priority of institutional accreditation generally hampers the evaluation of study programmes, so it is probably a solution that is simply convenient for everyone. It may be presumed that in fear of Bulgarian HE system losing good reputation and reducing the number of positions for staff and places for students, the program accreditation is postponed. It has to be noted, though, that this procedure is not neglected. During 2005–2007, 422 such procedures were conducted.

It has also been decided that NEAA is the sole, governmental agency to monitor the compliance of HE institution’s activity with law. It has legal authority to accredit all Bulgarian HE institutions and research entities, and the members of the Accreditation Council are appointed by the Prime Minister. The decision to grant accreditation is made by the Council, and the note on that is only sent to the Ministry. The Agency is a budget entity, however, HE institutions pay for accreditation procedures conducted in them. Thus, there is no complete independence; still broad prerogatives of the Agency need to be highlighted.

NEAA’s attitude to build its position within the European Higher Education Area is an ambitious one. In 2008, it was the first organisation in the South-East Europe to become a rightful member of the ENQA and it quite faithfully adjusted its criteria to the first part of the ESG which pertains to the internal quality assurance in HE institutions. As a result of the process, NEAA has three sets of criteria: on HE institutions, programmes of study and harmonised criteria. The last one is presented in publications aimed at foreign recipients, e.g.: ENQA (which is called Quality Procedures in the European Higher Education Area and Beyond – Second ENQA Survey, N. Costes, E. Helle (eds.), Helsinki 2008, p. 15. Among 51 agencies which participated in ENQA survey, there was only one more that had such broad competencies. NEAA conducts the following procedures for: institutional accreditations; program accreditations (also at the doctoral studies level); evaluations of projects for opening new fields of study and specialisations; evaluations of projects for opening or transformation of HE institutions; evaluations of projects for opening or transformation of basic organisational school units; follow-up procedures; definition of HE institutions potential. According to the President of NEAA, currently the actual possibility to have the accreditation procedures carried out by foreign agencies is not considered.

the external document). Actually, NEAA depends on the first two sets (the internal documents). There are certain discrepancies to be observed between them:

- It is visible especially in the item on standards of policy and procedures of QA in HE institution. In the harmonised document, the sphere of didactics has been clearly set apart. What is essential here is the participation of staff and students in research and the inclusion of research results in the programmes of study. The division may be a compliment to the students who, according to the Bologna Process guidelines, are to be central in the educational process; the position traditionally occupied by academic staff. The internal documents, though, unify those two spheres, creating common standards and criteria.

- It is only the harmonised document that contains the standard obliging HE institution to formalise individual QA strategy, policy and procedures. The internal sets concern only the development of internal systems of quality assurance. However, none of the documents obliges HE institution to involve students in the processes at the very concept level. This group is considered only at the evaluation of study plans and programmes, grading system or teaching methods.

- The external document specifies the standard of building the culture of quality by HE institutions. This term is not mentioned in the remaining criteria sets, where the culture of quality is incorrectly, identified too narrowly with the system of monitoring, evaluating, maintaining and improving quality.

Harmonisation is incomplete in all aspects, irrelevant to the actual state of affairs or may lead to inaccurate assessment, which is, however, not obvious at first:

- An example can be the standard on the issue of students evaluation, which was identified by NEAA as the implementation of the ECTS grading scale. In Bulgaria, the system almost only promotes students’ mobility, and credit accumulation has no value, is not used to monitor students performance.

- On the other hand, the standard on quality of the teaching and research staff contains an item on fulfilling minima specified by law. In Bulgaria, relevant legislation has been constructed in such a way that HE institutions and their units may operate in spite of serious staff deficits, or academics working in several positions dispersed around the whole country. Until 2004, the minima were defined by absolute figures, a faculty had to have 20 senior researchers. At present, 70% of lectures ought to be conducted by professors and post-doctoral degree holders. Such a criterion is simpler to implement and enables an increase in didactic duties of individual employees.
In all three criteria sets, the issues of student participation in evaluating staff activities, the material and immaterial HE institution base, and the possibility to use it, have been ignored.

The documents address the issue of HE institutions information system in an enigmatic manner. They fail to mention, for example, the monitoring of student and graduate performance, efficiency of academic teachers, or analysing the characteristics of student population. Also, the issue of publishing the information has been ignored. It limits the school’s marketing potential, which is an essential assumption of ESG.

Let us also consider how NEAA adjusts itself to the remaining standards and guidelines of the external quality assurance system included in the ESG which it has not been formally harmonised with. Both the problematic issues that hamper the adjustment, and the elements in accordance with the European guidelines shall be presented here:

- Agency legislation and *Higher Education Act* contain QA system objectives and stipulate procedures which are published at the NEAA website and in its bulletins. Although the main and actual objective of it is minimum standards monitoring and accreditation granting, it is officially indicated here that the objectives also comprise enhancing HE quality, improving its competitiveness and transparency.

- The Agency develops and publishes criteria sets for all procedures conducted (accreditation, evaluation, follow-up procedures). However, the materials for foreign recipients are incomplete, which limits full verification of the criteria.

- Not all the criteria may be interpreted explicitly, which is obvious; though, it might result in improprieties. For example, it has not been defined what elements ought to form the internal quality assurance system. Thus, HE institutions rather produce dummies of such systems.

- NEAA experts are not obliged to have knowledge and experience in the area of quality assurance. It is quite obvious since it is impossible to gain this type of large scale experience. Such a requirement would reduce the number of candidates for expert positions even more. Hence, it is necessary that senior researcher status, knowledge of European higher education systems, knowledge of relevant legislation, objectivity and discretion be required. However, means of verifying those features are unknown.

- Accreditation procedures are carried out by teams consisting of senior researchers. More and more often, they also include students, but foreign experts are rarely invited, which is caused by financial deficits. At all levels
of the Agency’s activity, representatives of external stakeholders have so far performed short-term consultive functions.\(^{38}\)

- The Bulgarian academic community is not large, academic teachers work in many positions, which leads to bizarre instances of evaluating one’s own workplace, or colleagues. According to the President of the Agency, experts sign declarations that they temporarily have no contact with a HE institution that is evaluated, however, in official documentation there is no such requirement.

- The Agency conducts procedures in accordance with the four-phase pattern: 1) self-evaluation, 2) visitation, 3) report, 4) decision. The next step is follow-up procedures. Such a pattern is compliant with European standards.

- Accreditation procedures are condensed and bureaucratised, which prolongs them to such a degree that at times a process which is ending overlaps the next one.

- An essential element of quality assurance procedures are reports, which ought to be published. In Bulgaria, HE institutions have to give consent to the publication of reports prepared by them. They are available in NEAA archive. Thus, the actual access to their content is not possible for all stakeholders, their verification is definitely hampered. Also, the reports by experts in the course of accreditation are not published in complete versions. At the NEAA website or in the bulletins, the Agency publishes extracts from reports which are conclusion of the entire procedure. For program accreditation, it prepares and publishes abridged summary reports for a specialisation, which contain elements of benchmarking.

- Fully public and available (websites of the Ministry, Agency and bulletins) is the general information on the final grade, period of accreditation and the potential of HE institution (number of students it may admit).

- The Agency has been broadening the scale of follow-up procedures, which assess the fulfilment of guidelines for relevant accreditation procedures. However, diverse, quality methods are not introduced here. The basis is still documentation and HE institution reports. According to the President of NEAA, it is caused by fund deficits.

- All NEAA procedures are cyclic. Accreditation period depends on the grade received (satisfactory – 3 years; good, very good – 6 years). The schedule of works is public.

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• The Agency does not have a separate research unit which would develop broader analyses of the material collected. However, it has developed *A Strategy of the Development of the National Evaluation and Accreditation Agency*[^39], in which it has been comprehended that the need to develop quality methods, to unify institutional and program procedures, and to widen the grading scale up to 10 grades, would actualise diversification.

Let us highlight several key issues pertaining to accreditation procedures by NEAA:

• In majority, they depend on the analysis of documentation prepared by HE institutions. Experts in Bulgarian HE system claim that the administration and academic staff designated to complete the task have learnt to prepare the reports in a strategic manner that presents advantages, and disguises disadvantages of a unit, or HE institution (the “shop window” phenomenon). This has been confirmed by the President of NEAA, who considers such practice typical of human nature, and the Agency’s task is to detect them.

• Criteria stated by NEAA focus on the inputs, however, the evaluation starts to cover also small parts of the outputs, e.g. the graduates’ position on the labour market. The basis here is quantitative data, performance rates. On the other hand, the Bologna Process clearly aims to implement quality methods and to focus on outputs.

• The Bulgarian quality assurance system ignores the following issues: the objectives of programmes of study; reasons for giving up studying; the average length of studying; HE institution profile (research vs. didactic); the concept, the philosophy of education; external stakeholders’ opinion; or social opinion on HE. Also, the procedures of international benchmarking are not considered.

Employing the above formal framework during 2005–2007, NEAA conducted a total of 486 accreditation procedures, the institutional and program ones. Negative grades were given to 2 HE institutions and 43 programmes of study.

From the perspective of *Phases of Quality Assurance System Development*, the Bulgarian QA system since its beginning, that is 1995, has been functioning at the lowest technical levels. It focuses on assuring basic educational standards of the Bulgarian HE system by means of accreditation. Formally, the following objectives has been defined: accountability, transparency, and even competitiveness of a HE institution; however, their realisation is still only declarable. In the very beginning,

the sources of information have been changed from descriptive reports into the self-evaluative ones, which continue to be strategic, but their reliability is questioned by experts and is difficult to verify as they are not available to the public. In spite of some changes that has occurred in this period, since 1995, one of the most important being the introduction of follow-up procedures, the system still fails to advance and enter higher levels. NEAA is developing and adjusting to European, Bologna requirements; however, it is completed only to the extent determined by the local institutional context of its activity. Consequently, quality assurance system remains basically unchanged and its impact on the transformation of HE system is still limited. Undoubtedly, though, it performs two basic functions: provides the state with control over HE institutions and legitimises the Bulgarian HE system in Europe and in the world.

The reason for the stagnation are actual problems that the Bulgarian HE system has long been unsuccessfully struggling with. These are basic deficits and difficulties which endanger minimum standards of education. Inability to overcome them leads to negative adjustment of the QA system to the state of affairs. As a result, it rarely happens that a HE institution or field of study are not granted accreditation. The system is then constructed in such a manner that it not only monitors but also protects higher education system, which in this case, also means lack of change.

6. Bulgarian academic staff – expectations of QA system

According to the model: Phases of Quality Assurance System Development, the advancement to higher, non-technical levels requires actual development of internal QA procedures within HE institutions and the culture of quality, that is, real involvement of the academic staff in the transformation. Their knowledge, comprehension, acceptation and expectations of the idea of quality assurance constitute the informal dimension of the system functioning, and are an indispensable factor of real transformation. It is also the group who is directly responsible for the quality of education, and also knows HE problems, which ruin this quality. Thus, the interviews addressed the three key issues: a) problems of the Bulgarian HE system; b) the quality concept formed by the respondents; c) expectations of QA system.

During the interviews with Bulgarian academic staff, it was the very issue of problems of their home HE system that was most widely discussed by the respondents. In all interviews, there appeared similar or the same issues with a different intensity. The respondents talked about the things that directly affect them, make
their work, and even decent life, more difficult; however, they also paid a lot of attention to systemic problems which destroy the Bulgarian HE system. These two aspects were often interconnected:

1. Financial deficits of the HE system – it is the key problem, listed as the first and most important by almost all respondents. Additionally, it is the reason for a number of further deficiencies:
   - Very low salaries force the staff to working in several positions. Academic teachers are constantly travelling. Lack of time and tiredness seriously hinder their scientific research development. It happens that students can meet the lecturer only twice, or three times a term. Consultations are then almost impossible.
   - Low salaries impede the development of the academic staff. Graduates are unwilling to remain at HE institutions, and they search for employment in better paid positions.
   - The bad financial condition of such universities as the Sofia University leads to losing potential students who want to study in warm, clean and well-equipped schools.
   - It must be highlighted that the respondents did not even mention the issue of deficits in funds for research, or publications. From their perspective, problems in their domain pertain primarily to the sphere of the very existence, both their own and that of a HE institution.

2. Social perception of academic staff and HE system – for the respondents, very often the biggest problem was not so much the issue of low salaries as the impact of this factor on their generally low social status. They have a strong sense of being underestimated and feel there is no understanding of their work. They account for social aversion to HE system by the fact that HE institutions fail to fulfil Bulgarians’ expectations, especially as regards the preparation of the youth to enter the labour market. What was also underlined was the negative image of this sector of education and its employees, shaped by journalists and politicians in the media. Here is a typical statement: “The social status of researchers in Bulgaria seems to be very low. It does not matter if you are an assistant lecturer, reader, or professor. The very label scholar sounds anachronistic, archaic and is associated with a person who works somewhere there, in a library, in dust and never goes out into the street, and the life in the street differs considerably from the life in the offices. And this is the general image shaped by the media. (…) It is a very deeply running sociological process that is obviously linked with our history. (…) Bulgaria has been a state without aristocracy, with a strong sense of that we all here are equal or we all come from the countryside, you know, this
still takes on multiple and diverse forms in Bulgaria” (Interview No. 5, a young doctor).

3. Low level of secondary education – the respondents demonstrated that HE problems result from the crisis of the entire education system in Bulgaria. Young people begin their studies with many gaps in basic general knowledge: “Education at the higher level is a function of secondary level education. And in Bulgaria, the secondary education has completely fallen into decline. Candidates for studies and students come to us with very poor knowledge, which includes that they are often illiterates, they make spelling mistakes, don’t have any basic knowledge of the history of Bulgarian literature, the history of Bulgaria, the same as of exact sciences, technical ones, chemistry, they don’t know fundamentals of mathematics” (Interview No. 18, a professor).

The respondents’ opinion of the level of students was definitely negative, both as regards their knowledge and their motivation and attitude to studies. Most of them work, skip classes and treat studying at HE institutions only as a way to obtain a degree that is necessary to function in the labour market, which they want to achieve with the least effort possible.

4. Problems with social demand – demographic low and more and more often departures of Bulgarian youth to study abroad result in an insufficient number of students willing to study at Bulgarian universities. Moreover, relatively few students continue studies after they have obtained Bachelor’s degree. The reason for this is the fact that the local labour market recognises undergraduate studies degrees, what is more, the tuition fee for the subsequent levels is higher. Consequently, even the best universities face the problem of free places at all levels of education. This has serious consequences since it entails lower state funding, danger of closing down institutions, faculties and fields of study, that is, reducing the number of job positions. However, such a situation does not encourage the respondents to conclude that it is indispensable to compete by offering better services. Some employees of the Sofia University even claim that other Bulgarian HE institutions take away their prospective students, which, in their opinion, is worthy of condemnation. And this is what quality assurance system ought to address. The way to compete for secondary school leavers is supposed to be the lowering of the level of education and requirements. It is a pathological solution, but in the present condition of the Bulgarian HE system, the respondents fail to notice too many alternatives. Certainly, it also results from their assessment of academic youth level.

In this context, almost nobody notices the problem of disproportional, too large number of students when compared to the staff and material potential of an institution. Still, the respondents highlighted that in Bulgaria there are definitely too
many HE institutions, little schools which fail to fulfil even the accreditation criteria, though, due to “political reasons” they are not closed down. What is meant here is the connections of local and state stewards with academic authorities.

5. Lack of debate on higher education – according to the respondents, the bad condition of Bulgarian HE is also due to lack of a coherent vision of how this sector of education is to develop, what functions it ought to have. “Everyone has their own interest and they protect it. There is no common vision, or even a discussion to develop it, nobody can communicate with one another, and they are still all academics” (Interview No. 9, a professor).

All decisions on changes are made top-down, without a social or community debate. Hence, divergent expectations of HE institution multiply, for realisation of which there is a deficit of strategies, resources and competencies. It has been highlighted that all activities, or postulations are built on a short-term basis, chaotically and, to a large extent, in order to “ingratiate oneself with Europe”。“There were some quasi debates on higher education, but the social and political thought in Bulgaria depends on Europe; if Europe says that the situation is good, then we, just like Pilate, wash our hands, everything is fine, there is documentation, the situation looks rosy” (Interview No. 5, a young Ph.D. holder).

The respondents feel excluded from the participation in shaping, developing and transforming the Bulgarian higher education. It was typical of many of them not to have a broader reflection on the state of local HE institutions. On the other hand, the knowledge of the Bologna Process – which has been implemented here since 1999 – usually did not go beyond the slogans: two-level system of education and ECTS grading scale. Some even did not recognise the name of the reform. It may signify the condition of the group, its empowerment, but also the level of the debate on higher education.

6. Corruption – the book Антикорупция/антиобразование⁴⁰, published in 2005, contained, among other things, a report from research on corruption in Bulgarian higher education. The phenomenon was diagnosed as a systemic phenomenon, and not as an individual one. Still, it was not an issue discussed willingly by the respondents, even by one of the authors of the book mentioned. They underlined that corruption does not concern the Sofia University and that if such practices take place, their frequency is still incidental. Definitely more open were young academic employees and persons connected with higher education who did not participate in the survey, though. They stressed that informal ways to deal with various issues are culturally consolidated, which they supported with many exam-

⁴⁰ Г. Димитров et al., op.cit.
There are some who have their own set rates, everyone knows how much has to be given, but it’s again not so common, but it happens. The case’s not that every exam looks like this. But it’s what you read about in the papers, or hear from students” (Interview No. 7, a young M.A.); “Well, it happens that some politicians or groups of clerks obtain a B.A. degree in a year. Nobody knows what’s going on, how it’s possible. And yet that’s the case” (Interview No. 13, a young Ph.D. holder).

The issues discussed by the respondents prove that the HE system in Bulgarian faces basic problems which question the fulfilment of minimum standards. It ought to be assumed that it has an impact on the vision of quality in HE system shaped by academic employees and their expectations of the QA system. However, those issues fail to take a coherent form in the respondents’ statements.

Academics, either as a group, or as individual employees of HE institutions fail to develop a uniform quality concept. It may be concluded from their incomplete, quite modest statements on the issue that they oscillate between new perspectives on QA and the traditional approach to academic education, with bias toward the latter:

- No one questioned the reasonability of an external QA system in Bulgarian higher education as a necessary mechanism of monitoring, especially the smaller institutions. “Systems of accreditation are needed because students go to work and if they aren’t prepared to carry out their professional tasks, it is a waste of the state’s money to educate them. This is why there has to be control over it” (Interview No. 18, a professor).

- None of the respondents opposed having the academic teachers’ work evaluated by the students. However, the majority mentioned that many colleagues of theirs are reluctant to accept this solution. According to some of them, student surveys are used only on a short-term basis within the procedure of promotion, when academic teachers ask the students they know better for positive opinions. The respondents also mentioned professors who claimed that such a kind of evaluation suits their position and prestige.

- Certain openness to students in the issue of evaluating and defining education quality does not entail a consent to such co-operation with other external stakeholders. Although the respondents support the idea of preparing students to enter the labour market, they want to do it, and they believe they are doing it, by means of traditional methods. The minimum education quality which they agree to – at least theoretically – is the realisation of programmes of study. They think that they are obliged to transfer knowledge and competencies to students, within the subject they teach. They are convinced that they are able to guarantee high level of their classes. In con-
trast, the strictly occupational education, to their minds, ought to be the duty of corporations alone. Intelligent and educated students have to be capable of acquiring new skills and information when they have entered the labour market. University is to develop them intellectually, to broaden their horizons. Employers cannot say what ought to be taught here, although such co-operation, still only to a limited range, is acceptable. If students are unprepared to start a job, then it is due to their weakness and the fact that such a function of a HE institution has not been defined and implemented. The academic teachers, on the other hand, fulfil their duties. It is a rational view on the situation. Academic teachers have been prepared and obliged to perform a particular job. Only one person declared that he/she regularly attends didactic workshops abroad in order to adjust his/her work to students’ expectations. This shows that, at present, changes at this level of a HE institution activity may at most take on an individual dimension.

What is visible here is a kind of hesitancy, or standing at a specific borderline. On the one hand, the willingness to cultivate traditional visions of academic HE institution which should not fraternise with business, or the economy. On the other though, the respondents showed certain understanding of contemporary conditions to which, in their opinion, the entire system of education is not adjusted, thus, it is also difficult for them to change anything. However, it has to be underlined that discussion about the concept of quality in HE system was not an easy topic for the respondents and they usually first addressed the level of students.

In spite of no coherent vision of quality in HE system, Bulgarian academic employees are confronted with QA system. Understanding the problems which the Bulgarian HE institutions deal with, they may formulate expectations both of the external and the internal procedures. However, as it has occurred, most of the respondents approve of the present solutions, but they cannot support this opinion with any particular arguments. During the interviews, it could be felt that the group has no actual contact with quality assurance system, and in turn, it does not have an impact on their work. “If the government supervises the Agency, then it probably must operate well and fulfil its role” (Interview No. 2, an older reader).

Only a few persons were able to discuss the QA system at some length. The opinions were basically critical and were expressed by employees with a longer work experience, who were at that time or previously in positions of authority within HE institution or its faculty, and by employees delegated to prepare accreditation documentation. They paid attention to the following issues:

- In the small Bulgarian academic community, in the course of accreditation, a considerable role is played by colleague networks, mutual friendly rela-
tions, aversions and obligations. It happens that members of teams visiting institutions are connected with them in some way. Such phenomena challenge the objectivity of the entire concept of external evaluation. “What is the case of accreditation? As a Slavist, I accredit Slavonic studies in Blagoevgrad and Plovdiv. And them, the professors from Blagoevgrad and Plovdiv – my colleagues – come to visit us. It is obvious that there will be some mutuality, or obligation. Thus, on paper, it all adds up, everything is wonderful. Apart from that, everyone works in several places, so they may accredit themselves at times” (Interview No. 4, a dean).

- The interlocutors indicated the functioning of the “shop window” phenomenon, that is HE institutions writing self-evaluation reports that focus on advantages and hide disadvantages of such institutions or programmes of study. “Accreditation depends on whether I will present my activities in documentation the best I can. Simply, if the secretary or junior assistant fails to do it in a formally appropriate way, then the unit of a HE institution receives a relatively low grade. Universities with strong administration can present their activities in such a way that they will really make a great impression on the Agency, and such is the practice” (Interview No. 5, a young Ph.D. holder).

- It was highlighted that accreditation is also excessively bureaucratised and it was described as a painstaking procedure of producing documentation which actually contains little information on quality and is unadjusted to many fields of study.

- The development of QA system and the Agency itself are, above all, instruments of building the image of Bulgaria in Europe, which are not completely adapted to the Bulgarian reality. “It is good that we pattern ourselves after Europe, but here it sometimes has to be done in a bit different way, more slowly. And it generally always ends up in a nobody-knows-what. But the most important thing is that there is such an Agency, so Europe is content, and our government is content as well. And how it all works is yet a different matter” (Interview No. 5, a young Ph.D. holder).

- As regards the internal quality assurance system, the majority of respondents could not say how it is organised and if it exists at all within their institution. Hence, almost all concentrated on discussing student questionnaires.

- For a small group of respondents, it is not a solution that is part of the QA system, but a short-term one used in the procedure of professional promotion. “Such a thing exists only theoretically. In practice, we use it very rarely. Only when we do the so-called attestation – the evaluation of an academic
employee so that he/she could get a rise or be promoted. And then the committee completes a questionnaire with the students and they evaluate didactics” (Interview No. 20, a professor).

- According to the interlocutors, the students often find it hard to be objective. Their opinion of a lecturer may be determined by what grade they were given by him/her. “I think highly of the idea of evaluating academic staff. However, the issue of subjectivity is very clear here. Certainly, I have to be evaluated by the students. But if I tell a student for example that he/she is not prepared well or I will not give him/her a credit, I cannot expect a high grade from them. Emotions play an essential role here. Thus, the grade cannot depend on students only” (Interview No. 14, a young Ph.D. holder).

- The respondents were also concerned about the possibility that QA system in a HE institution becomes an instrument of internal policy making, again based rather on colleague networks than academic criteria. Lack of trust in their own community was evident. “Here, it is the way that if a colleague is to arrange something for a colleague, or if it is a family matter, then really everything can be avoided. And it is more important if this changes, then maybe such systems, or other European changes will make sense” (Interview No. 7, a young M.A. Holder). “I talked to a professor from Canada. He was very surprised by my negative attitude. It was clear that he trusted the quality assessment system very much, that there it is not influenced by those personal relations which are so important here. And there, they have had a very long tradition of such evaluation of academic staff” (Interview No. 5, a young Ph.D. Holder). Here is another statement: “I think that such a system has to be implemented in Bulgaria, but it has to be very carefully thought-out and slowly implemented. Because having those negative consequences, it will be very easy to ruin the trust in the system. And probably Bulgaria is the most nihilistic country in the EU anyway. All that is new is being implemented in such a way that it rather makes our lives more difficult, not easier. Thus, there must be a broader debate and a system which would be slowly, slowly implemented within HE institutions” (Interview No. 5, a young Ph.D. holder).

- According to part of the respondents, a reliable system of evaluating the level of academic staff would hit the status quo represented especially by the professors, positioned the highest in the hierarchy. That is why the internal QA system is a dummy solidifying the current state of affairs. “For some, stagnation is the best. Why change anything? It causes anxiety. What do they fear? You may guess. But they have been strong groups so far; it seems little
can be done here, at least for the time being” (Interview No. 14, a young Ph.D. holder).

To conclude, it ought to be underlined that most of the respondents showed very low awareness as regards quality assurance system in Bulgarian HE. Its external and internal elements function somewhere in isolation from reality in which they work and have no real impact on. The elements are also not so much troublesome that they are easy to be accepted unreflectively. This is why they have no expectations of quality assurance system, they fail to notice any reason to change anything in it.

The other, much less numerous group of respondents justifies this phenomenon with the fact that academic staff is not included either in the process of QA system development within the Bulgarian HE, or in any transformations. Their expectations evidently focus on the need for a broad debate over the concept of quality assurance, with the participation of various circles, but above all, the academic one. They stress that the development of such a system is worthwhile only when it performs actual functions that lead to improving the quality of Bulgarian HE institutions. They fear the apparentness of procedures which they observe within the current solutions. Moreover, the respondents cared about the possibility to draw real distinctions between HE institutions, which was caused by the fact that they were employees of the Sofia University. What was also important for them was to develop instruments minimising the subjectivity of evaluation, which requires the formation of complex procedures that would not be limited to student surveys.

The respondents paid little attention to specifying the objectives of quality assurance system. They addressed only the local context, the levelling of problems and pathologies which beset the Bulgarian HE. The issues of internationalising HE institutions and increasing their competitiveness and innovativeness were not raised. This again proves that not having solved those basic problems, the realisation of the above discussed challenges, postulated, among other things, by the Bologna Process, will not be possible.

7. Conclusion

The Bulgarian quality assurance system in higher education has existed in an almost unchanged form since its very beginning. It results from the fact that the local HE institutions still struggle with basic problems, which endanger standards of education. Thus, the quality assurance system has stuck in technical phases, without any greater successes, though. Undoubtedly, it performs certain important
functions of supervising the institutions and legitimising the Bulgarian HE in Europe. However, especially in the latter case, the consequence is the employment of many apparent formal solutions which do not have actual impact on the quality of education. The system is developed, or maintained in isolation from the academic reality. The staff know little about it, they have not participated in its development, and QA procedures fail to address their problems. Hence, in this context, we can talk about apparent institutional transformation or, perhaps, a slow actual one whose results are not yet visible. Evidence for that is the fact that the current minister in charge of higher education – Sergei Ignatov – has publicly stated that Bulgarian HE institutions at best demonstrate the level of higher years of secondary schools\textsuperscript{41}. The quality of Bulgarian HE institutions, thus, fails to satisfy the academic staff, the state authorities, the students, the labour market, or the economy.

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The paper presents the results of a study on the implementation of quality assurance system in Bulgarian higher education. Both formal and informal dimensions of the implementation of this key instrument of the Bologna Process have been considered. A two-aspect perspective of the reform implementation, that is including the opinions of the regular staff, is not a common attitude in studies on the Bologna Process. However, without this group’s participation in carrying out the policy of quality assurance, any improvement in the sphere seems out of question. The first part of the paper contains a description of two different concepts of education quality. The next sections pertain to the contemporary situation of the Bulgarian HE system, the key elements of the theory of institutional transformation and to the methodology of the study. The last and longest section presents two dimensions of the study: 1) an analysis of the formal framework of Bulgarian quality assurance system in higher education, based on Standards and Guidelines for Quality Assurance in the European Higher Education Area and the model: Phases of Quality Assurance System
Development; 2) the second part of the study refers to Bulgarian academics’ expectations of QA system. Also in this case, the basis for the analysis was the above-mentioned model. Thus, the essential part of in-depth interviews was that the respondents define the most important problems of the Bulgarian higher education, which ought to be solved by the quality assurance system. The study showed that the Bulgarian quality assurance system has all the time been operating at the lowest technical levels, still, for a dozen or so years, it has failed to deal with basic problems that beset the HE institutions. QA is here an instrument of controlling and gaining credence by the Bulgarian universities internationally which is implemented in a top-down manner without consulting the academic circles. The knowledge on the QA mechanisms among HE staff is quite poor. They are not interested in these issues since they fail to experience their actual impact on the Bulgarian HE system.

Key words:

Quality assurance (QA) in higher education (HE), Bologna Process, Bulgarian higher education, academic staff
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ON DIFFICULTIES OF EARLY FOREIGN LANGUAGE TEACHING – BASED ON OBSERVATION OF THE ORGANIZATION OF LANGUAGE LEARNING OF BEDOUIN CHILDREN IN ISRAEL

1. Introduction

Language, religion and culture play an important role in education. Pluralism and interpenetration of cultures in today’s world confronts the school with the important task to prepare for life in a multicultural society. The school should not only respond to the developmental needs of children and adolescents, but also to changing social conditions. Education should, therefore, move towards building a society in which people of different backgrounds feel the sense of belonging and attachment to a country, while retaining the right to learn the culture from which they originate. F. Mayor\(^1\) claims that every culture or community can play a significant role in creating a global system of education. According to Mayor, a twenty-first century school should develop appropriate citizenship attitudes, aiming at achieving the following objectives:

- **identity** – which promotes the formation of a society where people of different backgrounds feel the sense of belonging and attachment to the state, but retain the right to learn the culture from which they originate;

• **social justice** – which ensures fair and equal treatment of citizens, respecting their different origins;

• **social activeness** – which activates and enables citizens to shape the future of their local communities and the entire country.

Learning foreign languages helps shape proper citizenship attitudes. Therefore, at present in Europe, the issue of effective teaching of foreign languages is widely debated. *The White Paper on Education and Training. Teaching and Learning – Towards the Learning Society*[^2] published in 1995 attaches great importance to the teaching of foreign languages and international exchange of students. The report stresses the need to ensure the quality of language education in the intercultural aspect. The aim of education should, therefore, be to create and optimize the conditions for access to foreign language teaching in Europe and other continents. It is extremely important in the view of uniting Europe and opening-up of borders. The increasing mobility of people in Europe makes even rarely spoken and learned languages become more attractive. The report stresses that command of several foreign languages has become a prerequisite to allow EU citizens to benefit from professional and personal opportunities. Authors of the report believe that in order to enable the command of at least two foreign languages, a systematic study of the first foreign language should start as early as in the kindergarten.

A similar position can be found in the *Education and Training in Europe: Diverse Systems, Shared Goals for 2010. Detailed Work Programme on the Follow-up of the Objectives of Education and Training Systems in Europe*[^3]. It says that “Europe’s diversity is nowhere clearer than in its languages. Yet citizens can only benefit from this diversity if they are able to communicate with others across the linguistic lines and thus to learn about differences, tolerance and mutual respect. […] The ideal that everyone should be able to speak two foreign languages remains as a guiding principle. There is a basic need to improve foreign language learning, including, where appropriate, from an early age”.

However, early foreign language teaching raises many concerns and misunderstandings. On the one hand, it is emphasized that foreign language learning organized from the youngest age ensures its good command. This is confirmed by re-


search presented in the report by the European Commission: *Foreign Languages in Primary and Pre-School Education: Context and Outcomes*[^4], published by the Centre for Information on Language Teaching and Research (CILT). The main conclusions drawn from the research were that early foreign language learning can have a very positive effect on pupils in terms of language skills, attitudes to other languages and cultures, and self-confidence. On the other hand, it was observed that an early start, in itself, does not guarantee better results than a later one.

2. Controversy over early teaching the Hebrew language to Bedouin children

I have recently participated in a visit to the Kaye Academic College of Education in Be’er Sheva, in Israel[^5], and I have had the opportunity to observe the organization of education for Arab children in Israel, including the organizational and methodological issues related to teaching the Arabic and Hebrew languages.

The methodological basis for data collection was a qualitative method with features of comparative monograph. I was particularly interested in the socio-economic context of the organizational solutions used in Israel in the field of education. Therefore, before I proceed to characterise the rules of organizing education for Bedouin children, mainly the teaching of Arabic and Hebrew – I will try to briefly outline the situation of the Bedouin in the area[^6], which is important for further discussion.

Be’er Sheva is located in the Negev Desert, in the southern district of Israel. In the early nineteenth century, only the Bedouins lived there. Under the UN partition plan for Palestine, Be’er Sheva was to be included in the territory allotted to the proposed Arab state. However, during the Arab-Israeli War of 1948, the Israelis occupied Be’er Sheva and began to settle there. Currently, most inhabitants of Be’er Sheva are Jews, the vast majority of whom are immigrants from the former

[^5]: The visit took place on 12–19 December 2010, in the framework of cooperation between the Maria Grzegorzewska Academy of Special Education in Warsaw with the Kaye Academic College of Education in Be’er Sheva, Israel. The main objectives of the visit included: exchange of experience regarding preschool education, as well as sharing information on the research conducted to develop scientific cooperation.
[^6]: The information was prepared on the basis of data collected during the visit and the text by Z. Coursen, *Discrimination Against Palestinian Arab Children in the Israeli Education System*, “New York University Journal of International Law and Politics” 1.05.2005, pp. 101–162.
Soviet Union. The Bedouins still live in the Negev Desert area, but they are a minority, and unfortunately Bedouin culture is beginning to disappear.

In 1948, the government moved the Bedouins who remained in the Negev to a military zone in the vicinity of Be’er Sheva, and thus they lost access to education. The government provided them only with a minimum of educational services: the majority of schools had only four grades, and attendance rates were very low, especially among girls. Until 1969, when the first secondary school for the Bedouin was established, those of the Arab community who wanted to educate themselves further had to obtain a permit to attend school and pay their own travel expenses and board.

In the 1960s and 1970s, the Israeli government exerted pressure on the Bedouins living in the Negev desert region so that they leave the area and move to the selected towns of Tal Al-Saba/Tel-Sheva, Rahat, Ar’arat an-Naqab/Ar’ara BaNegev, Kuseife, Shaqib al-Salam/Segev Shalom, Hura, and Lakiya. Those towns had the lowest rate of socio-economic development. The Bedouins were reluctant to leave their traditional settlements. It is estimated that only about 60% of the Bedouins of the Negev Desert live in the seven towns officially recognized by the Israeli government. At the same time, since 1960, the Bedouins have been establishing their own kindergartens and schools in the towns where they were resettled. Thus, the level of literacy among the Palestinian Arabs is increasing. Also, the percentage of Arab youth in higher education is rising. Nevertheless, the differences in the quality of Jewish and Arab education remain significant.

The vast majority of Arab and Jewish children continue to attend preschool institutions separately. Moreover, my observations prove that Arab children at preschool age do not speak any Hebrew at all. They do not know even the basic words for hello or goodbye. They start learning Hebrew in the fourth grade of primary school.\footnote{Primary school in Israel is six years, and then children continue to attend junior high school for three years. In Israel, there are four types of schools: public religious (Jewish), public secular, orthodox, and public for the Arabs. Israel has also private schools, which are run mainly by Catholic and Protestant organizations. The language of instruction in Jewish schools is Hebrew, and in Arab schools – Arabic. Arabic is taught as a secondary language in Jewish schools.}

The question arises as to why children who live in a country where the official language is Hebrew start to learn it so late? Bedouin female teachers explained that it is important to them to emphasize their separateness from the Jewish community and preserve their own culture and identity.

It is worth noting, however, that almost half of the Arab students who pass the high school final examination fail to get into college. Khaled Arar argued for ex-
ample that the psychometric tests, which are the basis for admission to studies, can be culturally biased, which impinges on the results obtained by the Arab students.

He points out that the differences in psychometric tests between Jewish and Arab students have remained at a constant and relatively high level from 1982 onwards.\(^8\)

Certainly, the concern for preservation of their culture makes the Arab community exclude itself from participation in the life of the Jewish community. But that is only the tip of the iceberg. The Jewish community also shares quite a disapproving attitude towards the Arab one. Despite the declarations of friendliness and cooperation, there is a sense of mutual animosity between the two socio-cultural groups.

It has been proved by the feedback I gathered from the staff of the Kaye Academic College of Education in Be'er Sheva on the organization of teaching Hebrew to Arab children. Most of them believe that the adopted scheme of teaching the Hebrew language, starting in the fourth grade of elementary school, is appropriate. In their view, a different organization of teaching Arabic and Hebrew would prevent Bedouin children from learning either language properly. They support their claim with the fact that Arabic is an extremely difficult language and moreover, it has two varieties – the classical, used in writing, and the modern one, used in speech. They emphasized that children first learn to speak, and then, for the first three years, get to know the written Arabic. As a result, it is as if they were learning two foreign languages. In addition, Arabic script is very complex. The letters may have different forms depending on their position in the word (initial, middle, final, or isolated). The argument is that if students learned the Hebrew alphabet at the same time, it could unnecessarily interfere with the acquisition of the Arabic language.

It is impossible to disagree with the argument that learning two different alphabets at the same time may interfere with the child’s language competences. However, wouldn’t it be worthwhile to introduce brief Hebrew lessons at the earlier stages of education (without having to learn writing) in order to develop communicative skills in that language? Is it really not important to shape linguistic communicative competence in Hebrew from an early age?

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3. Early foreign language teaching – concerns and misconceptions

The command of Hebrew by Arab children can give them the opportunity to choose any path of further education. At the same time, the Bedouins are afraid of losing their own identity and culture. Teachers – both Arab and Jewish – do not have sufficient methodological knowledge and they perceive teaching language as the alphabet, writing system, proper use of certain phrases, etc. They stress that in the case of these two languages it is too difficult, and they are afraid of failure.

Undoubtedly, early teaching of foreign languages should take into account the following conditions:

- **psychological** – the mental capacity of children, including the development of speech (articulation possibilities, level of communication, etc.);
- **pedagogical** – methodological guidelines for early teaching of foreign languages, including a teleological/curricular, structural, and methodical/media model of early foreign language teaching;
- **organizational** – the frequency of lessons with children, situational contexts, carefully selected training measures, tailored to students’ cognitive capabilities.

Indeed, if the process of early language learning is being implemented without due attention to the above conditions, the results of such teaching may be opposite to those intended. Consequently, disappointing results may lead to a general reluctance towards early teaching of foreign languages, such as teaching Hebrew to Arab children.

The problem is extremely complex. In Poland, the socio-cultural situation is not quite as complex, but the issue of effective teaching of foreign languages to preschool children is also controversial. Foreign language classes for children are often given by random people⁹ – students in different majors with a foreign language certificate or philologists who temporarily cannot find another better paid job. Such people often do not have enough knowledge of early foreign language teaching methodology and psychology of child development in order to effectively plan and implement the educational process.

Sometimes, teachers are well-prepared theoretically, but are unable to use their knowledge in practice. In class, teachers lose a lot of time correcting erroneous or incomplete statements made by students, and sometimes such incompetent teach-

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ing unnecessarily discourages children to learn a foreign language, which has far-reaching consequences at a later time. Often, teachers are not capable of introducing songs or rhythmical texts so that students can master vocabulary and be able to use it in different situations, not just in one specific context.

Furthermore, there is a lack of interesting teaching aids which would stimulate, and even support the development of children. Teaching materials that are available on our publishing market are often attractive only at first glance (visual attractiveness). However, after examining their actual usefulness, a number of methodological doubts usually arise. In practice, it turns out that children have solved almost all the tasks in the book after the first few classes.

Moreover, there is no coherent concept, and consequently no curriculum of foreign language teaching to preschool children which would be related to the content of language education in the first years of primary school and would give clear guidance – in terms of methodology and techniques – on how to organize work in foreign language classes in kindergarten in different age groups, how to grade course content, and how to develop language communication skills in children. Those are just a few gaps in early teaching of foreign languages.

Undoubtedly, while planning the process of foreign language teaching, one should also take into account cultural differences. This is particularly important as the adoption of methodological patterns of teaching young children used in other countries does not bring the expected results. I suspect that this is the problem faced also by the Bedouin and the Jewish community. It is worth noting that the development of communication skill is deeply rooted in the archetypes of family and social upbringing. The younger the child, the stronger the impact of socio-educational factors is. An example of such a situation may be even the difference in personal space as one of the signs of human spatial behaviour.

Personal space varies depending on various conditions, the most important of which include culture and the social environment, gender, and age\(^\text{10}\). Personal space and the way it is treated are important non-verbal messages. The distance that people keep in relation to other people indicates, among other things, the emotional relationship with the interlocutor, social status, or type of conversation.

Children transfer the patterns of linguistic behaviour from their mother tongue onto the foreign language. Patterns of socialization and adaptation – also in the linguistic aspect – influence the organization and conduct of foreign language teaching. Thus, I assume that this is why it is in the fourth grade of elementary

\(^{10}\) E. Hall, *Ukryty wymiar* [The Hidden Dimension], Warszawa 2001, p. 164.
school, when the child is already well-embedded in the Arab culture, that he/she is allowed to go beyond Arabic and enter into a new language, and thus culture. Surely, that happens at the expense of good command of the official language of the area where the Bedouins live, but allows them to retain a strong cultural separateness and sense of identity.

The question arises what is more important and whether it really would not be possible to plan the learning process is such a way as to enable the Bedouin children to learn speaking skills in Hebrew, simultaneously promoting coherent development of their own cultural identity. Is it not possible to conduct foreign language teaching together with the development of intercultural competence, which would help the student to function effectively in the multilingual and multicultural world?

4. Difficulties related to the development of speaking skills in a foreign language

These considerations can be embedded in a broader context. The problem of developing speaking skills in a foreign language is extremely complex. It is difficult to explicitly describe how the child learns to speak a language that is not their native one and how they can achieve proficiency in the use of that language to communicate with others.\(^{11}\)

Researchers in the area of linguistic development have tried to describe the phenomenon of native language code acquisition by children.\(^{12}\) However, they are not in agreement as to how to explain the process and therefore, there are many language acquisition theories. The issue of language acquisition is complicated even more so when we want to explain how children acquire a foreign language. A language user, in order to select the appropriate language structures to match the intentions of their message, the situation and the recipient, engages their own cognitive, emotional and social capabilities. The level of integrating those capabilities determines the effectiveness of communication. Thus, the proficiency in

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\(^{11}\) Ida Kurcz distinguishes between simultaneous and selective bilingualism. Simultaneous bilingualism occurs when a child starts to learn to communicate in a second language before the age of three. Successive bilingualism is associated with learning a foreign language after the age of three, often in institutional conditions. Cf. I. Kurcz, *Język a psychologia* [Language and Psychology], Warszawa 1992, p. 190.

\(^{12}\) Cf. theories of learning and social influence, theories of social interaction, nativist language acquisition theories, constructivist cognitive theories, which emphasize the importance of cognitive processes common to mental development in language development.
communicating depends not only on the linguistic competence but also the communicative one\textsuperscript{13}.

Communication during foreign language classes for children takes place under certain conditions, at a certain time and depends on the social roles of the individuals. The area of communication is usually kindergarten or school, and the exchange of information between the teacher and the student takes place during the lessons. Interaction participants in such educational communication share the formal type of social contact, in which the dominant role in the communication process is played completely by the teacher. Projecting that onto the situation in Israel – it may be difficult to accept that classes in a Bedouin kindergarten be taught by a Jewish teacher.

It is worth noting at this stage that in sociology language is treated primarily as an element of culture, a symbolic code. Language, therefore, reflects the various social and cultural phenomena in a society, which may not necessarily be apparent at first glance in the language layer. This may be another aspect that contributes to the reluctance towards early start of teaching Hebrew to Bedouin children, given the mutual Jewish-Arab animosities. Thus, a Jewish teacher would teach Hebrew in a particular discourse, which may be difficult to accept by the Bedouin community. The only reasonable solution seems to be teaching Hebrew by a female Bedouin teacher.

Developing speaking skills is consistently regarded as the goal of language teaching. Communicative competence in each of its dimensions is dependent on cultural conditions. Thus, effective linguistic communication requires the participants to develop appropriate intercultural and interpersonal sensitivity. Developing communication skills is thus firmly embedded in the socio-educational conditions that should be considered when planning the education process in early language teaching. This is certainly a big challenge for the Arab and Jewish communities.

5. Conclusion

It is worth reminding that in the Foreign Languages in Primary and Pre-School Education: Context and Outcomes Report (2000)\textsuperscript{14} it has been noted that, considering the selective acquisition of a foreign language by children and the difficulty in

\textsuperscript{13} Cf. S. Grabias, Język w zachowaniach społecznych [Language in Social Behaviour], Warszawa 1994.

transferring linguistic skills to other situational contexts, it is important to ensure continuity of pedagogical actions between the foreign language teaching in kindergarten and at later stages of education. It is also necessary to conduct research that would aim at developing methods of early language teaching. Innovations in foreign languages teaching should not be limited only to lowering the age at which children begin to learn them. Appropriate teaching methods should be developed, tailored to different age groups and cultural backgrounds. The report also highlighted that the time spent on early learning of foreign languages – especially on practising speaking skills – should be extended if possible. Preferably, there should be short daily lessons, rather than one or two lessons per week.

However, even everyday lessons will not guarantee a teaching success if the lessons are not of high quality. For that to happen, teachers – apart from the command of language, the ability to analyse and describe it – should have pedagogical skills, with a particular emphasis on the competence to teach foreign languages to young children. Also, what is extremely important is the awareness of cultural differences between particular groups of students and adjusting the educational process to the recipient.

BIBLIOGRAPHY:

On Difficulties of Early Foreign Language Teaching

Developing speaking skills plays an important role in foreign language learning. At the same time, it is a very complex objective, which is due to several factors: methodological, cultural, and psychological aspects. Recently, I have participated in a visit to the Kaye Academic College of Education, Beer-Sheva, in Israel, and I have had the opportunity to observe the organization of language education for Arab children in Israel. This experience has inspired me to reflect on difficulties connected with early language teaching, often accompanied by many concerns and misunderstandings. The results of these considerations are presented in the article.

SUMMARY

Foreign language, language competence, communicative competence, culture, methodology, teaching
EDUCATION FOR SOCIAL WORK ON EXAMPLE OF SOCIAL PROJECTS BY STUDENTS OF SOCIAL WORK COLLEGE IN INSTITUTE OF SOCIOLOGY AT UNIVERSITY OF SILESIA

1. In search of standards of education for professions in social work

Professional preparation for social work has been a subject of questions and doubts. They relate to the directions and standards of education and sometimes focus on substantial questions referring to the essence of social professions or the acknowledge...
edgement of the professional status of a social worker. Undeniably, among these questions, the issue of the continuously increasing level of social requirements concerning social professions including social workers appears. Professional competences are necessary to achieve the primary objective of social work, namely providing help to individuals, families and communities in overcoming life difficulties and regaining the abilities to manage them themselves. These competences are acquired in the process of multi-conditioned and systematic education connected with practical actions.

In the modern model of social work, a social worker is faced with much more comprehensive and differentiated professional requirements. A necessary condition for meeting these requirements is increasing their independence and flexibility in action. The ability to appropriately and fully diagnose the situation of the client (or group), in their relationships with their community and planning adequate support actions is conditioned by being knowledgeable in different fields of science. There will be the more possibilities of effective intervention, the more problems of the client a social worker will be able to understand and explain. It also requires providing social workers with more and more extensive and precise knowledge, thanks to which they will perceive and define client’s problems in a wide context of their conditions and aspects, equipping them with the skills of flexible reaction and choice of adequate methods of actions in a specific case, conducting on-the-spot analysis of the relationships between numbers of variables that determine a situation, as well as skills to appropriately define their clients’ social roles.

Yet another challenge to the process of professionalizing social work is the development of the methodologies of actions. The success in that development depends on educating for social work in such a way that would be of a more inter-
disciplinary nature than it is today, with a great emphasis put on developing skills of methodological conduct within three primary methods of social work and the skill of their application in practice. If we take into consideration professional qualifications which are needed in work with individual case, group or local community, we could say that these methods are subject to modification and division into separate professional specializations. The knowledge, skills and ways of actions needed in each of them are so extensive and different that could become a subject of specialist education.

At present, competences and skills acquired during Bachelor’s studies at the faculty of Social Work\(^3\), which has been a separate faculty since 2007\(^4\), with enacting new standards of education, are the basics of social work\(^5\). It is the first stage of education which, despite being the condition sufficient for performing the profession, is most often supplement with master studies\(^6\) at similar faculties, postgraduate studies or finally with courses of specialization in the second degree in the profession of social worker. However, the process of education within tertiary education is not limited to acquiring the next level of knowledge developing professional skills. By means of programmes of workshops and practical classes, students are able to build the basics of their competences, including professional identity and awareness indispensable to develop the culture of social actions of social professions representatives\(^7\). Such course of education could result in preparation to both realize the current tasks and to anticipate actions, based on the analysis of one’s own skills and available resources. It could encourage to creatively and courageously undertake innovative solutions and strengthen the inclination to reflect on actions. The professional social projects constructed during the course of education, which are a condition for completing studies at the faculty of

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\(^3\) Qualifications required to perform the profession may also be achieved by obtaining the diploma of a college of social services workers (until the end of 2015) and within the specialty preparing for the profession of social worker at one of the faculties: pedagogy, special pedagogy, political science, social politics, psychology, sociology, family sciences (until the end of 2013).

\(^4\) Social Work College at the Institute of Sociology, University of Silesia – the faculty of Social Work was introduced in the academic year 2009/2010.

\(^5\) Education standards for the faculty: http://www.rgsw.edu.pl/files/active/0/praca_soczalna20070210.pdf [access: 06.04.2011].

\(^6\) For students with minimum 5 years of practice in the profession of the social worker.

Education for Social Work on Example of Social Projects

social work at the Social Work College in the Institute of Sociology, University of Silesia, is an example of employing the skills enumerated above.

2. Social projects in response to real social needs

Connecting theoretical academic curriculum with a broad programme of training periods for students has been an essential function of the Social Work Department at the Sociology Institute of the University of Silesia since the very beginning of its foundation. The training periods have the forms of inspection, or help, in various social care institutions; student practices and other contacts which, although numerous, have not been formalised. This is one of the main reasons why, since the very beginning, it has been assumed that dissertations by the third-year students to be granted Bachelor’s degree will be in the form of a social project, based on a diagnosis of a specific social problem in a particular community. Such a project is therefore supposed to be located in a specific, selected environment (i.e. district, city, or sub-district). The project requires not only a diagnosis which would illustrate the needs of such a local community, but also the recognition of local resources, which may either be taken advantage of in the project or be supplemented with outcome of the planned project (if they are insufficient). Preparation of such a social project provides non-employed students with another golden opportunity to establish informal contacts and to start an individual, ongoing cooperation with social care institutions. These contacts frequently result in employment proposals coming right after graduation, which under the current conditions of the employment market and serious difficulties in procuring employment is a matter of vital importance. As far as employed students are concerned, with the social project they will be able to acquire more practical experience and benefit from other people’s skills and experience in their own work. The emerging projects are very diverse as regards the methodology applied, type of clients to which they are addressed, problems and local communities they concern. Thus, such projects may contribute decent resources to numerous social help institutions to exploit and to other associations and organisations, as a means of solving local social problems. Several examples of social projects concerning various social problems and addressed to numerous groups of clients are presented below.

Among the programmes of institutional nature, there has emerged an interesting project by Anna Rolka addressed to children and assuming the creation of community halls. The project considers the situation of the youngest representatives of ethnic groups who live in grinding poverty. The project was designed spec-
cially to deal with the problem of Romani children (project entitled The Arrange-ment of Community Halls for Romani Children from Poor Families in the Centre of Katowice – Organizacja świetlicy środowiskowej dla dzieci Romów z ubogich rodzin w centrum Katowic).

The relevance of initiating such actions is confirmed by figures, quoted in the text, which not only outline the social and living conditions of Romani families but also indicate a high degree of social isolation of these groups of children – a result of their membership in the ethnic group. Permanent position on the margin of social life makes it impossible for Romani children to take advantage of the already existing institutions in Katowice, such as community halls designed for helping children, and this results in the constant deterioration of the children's social and psychological condition. A significant portion of the families faces issues such as violence, alcoholism and parental carelessness. A factor that additionally makes it difficult for Romani children to fully integrate with the society is premature and unlawful (according to the Polish legislation) cessation of education (usually around the 4th or 5th grade of primary school). The designed hall would ensure systematic (rather than short-term only) and multi-directional support performed with caring, educational and therapeutic help. Bearing this goal in mind, organization of educational classes and interest clubs has been suggested.

Moreover, the psychological counselling service and creation of support groups have been allowed for in the project, which would also be aimed at parents of the fore-mentioned children. The author suggests that engaging activities would help teaching and improve essential sets of social skills and learning habits, whilst maintaining positive thinking and creativity. Meetings between groups from other halls, focusing on interaction and group activities, would create favourable conditions for integration with children from other communities. Creating a hall council (the equivalent of a student council) could result in an excellent opportunity to improve resourcefulness, independence and a sense of responsibility, as well as skills such as reaching crucial life decisions; all of them being essential in later life.

Two methods of social work are expected to be applied in order to realize all these aims. The extent to which each method is used depends on the stage of development of the hall group. In the initial phase of organising the hall, the author anticipates the case work method, which is apparently indispensable for a precise diagnosis of the child’s social position, its psychological profile – individual needs, personality features, fixed behaviour patterns. At the moment, when the quantity of participants is fixed, the case work method would be no more than a supplement to group work, which from this moment will be treated as the basic method in supporting the process of change.
The author anticipates organising an interdisciplinary team in order to improve the effectiveness of the designed actions. Its aim would be to establish and maintain contact with important institutions in the city such as the Society of Romans in Poland, the help of which could turn out to be critical as regards convincing Roman children’s parents of the purposefulness of the services offered. The manager position of the intended community hall would be held by a social worker, whose tasks would be to gather personal details of the participants, to mediate between children’s parents and teachers and to explore various ways of helping the children’s families.

Not only a child, but also an adult is often addressed by a social project concentrating the system of helping people living in poverty. This trend of assistance is broadly illustrated in the project by Anna Herman entitled *Self-Help Support Group for the Underprivileged* [*Samopomocowa grupa wsparcia dla ludzi ubogich*]. Having carried out careful observations and having estimated the scale of poverty in the area of Zabrze, the author suggested arranging community forms of helping poor residents of the sub-district Janki. Within the limits of the self-help support group, long-term unemployed inhabitants of the sub-district, who are provided with help by MOPS (municipal centres of social assistance), would meet each other. The purpose of the support group would be to prevent functional deprivation and social marginalisation of its members. Utter solitude, atrophy of social life and exclusion from a broader community weaken psychical condition and frequently strengthen disruptive strategies of dealing with such difficult situations of individuals (i.e. alcohol addiction, aggression) among people devoid of fundamental emotional and material needs. According to the author, a breakthrough in the helplessness and unwillingness to initiate any kind of activity would create opportunities for these people both to meet within the group of those who have already experienced similar obstacles in their lives, and to organize a wide range of courses and activities i.e. culinary, dressmaking and tailoring courses, DIY (do-it-yourself) clubs and cultural activities. A series of discussions and therapeutic meetings chaired by a qualified psychotherapist would be an essential element of the planned set of the group meetings. A social worker who diagnoses the phenomenon of poverty on a local scale should be responsible for initiating the project. His role would also include other tasks such as inviting a group animator, mediating in case of any conflicts within the group, delivering information necessary to solve issues related to poverty and helping the group members in developing crucial skills. Group processes characteristic of the used method of group work would facilitate the development of desirable patterns of individual and social behaviour in the group members.
Among projects aimed at the underprivileged, there is one by Beata Ogórek. The project entitled *The Help Plan for the Dysfunctional Family X – in Care of Social Assistance Centre in Bytom* [*Plan pomocy dysfunkcjonalnej rodzinie X – podopiecznej OPS w Bytomiu*] assumes the creation of a multidimensional assistance plan for the whole family. Careful analysis of the family’s history and use of observation instruments and diagrams: family tree, eco-map and the family structure were the basis for developing a reliable social diagnosis, which is indispensable for formulating aims of assistance and designing forms and methods of their realization. For improving social integration of the family and its individual members, the project initiator recommends, among a number of actions based on the method of case work, employing the following:

- strengthening,
- ecological approach towards working with the family,
- task concentrated intervention,
- and various other types of methodical actions such as support, informing, supervision, establishing new social contacts.

Their aim is to create possibilities for the family so that it can entirely benefit from the help of institutions and individuals. To achieve the highest possible level of independence and self-sufficiency is also an objective of great importance. The principle of strengthening competences and developmental possibilities of the family is assumed to be the most important here. In order to realize it, a social worker would have to take educational actions (provide necessary information and develop skills essential for the family members to help each other) and manage resources (mediate between institutional resources and the family itself in order to activate the resources of the family).

A project that presents work in a local environment is the one by Maria Dudzik entitled *Local Community Activation Through Participation in Eco-Workshops to Improve the Functioning of Dysfunctional Families* [*Aktywizacja środowiska lokalnego przez udział w warsztatach ekologicznych w celu poprawy funkcjonowania rodzin dysfunkcyjnych*]. The concept assumes carrying out international ecological workshops as a way to improve physical and psychological condition of the youth living in an environmentally and socially degenerate area of Siemianowice Śląskie. The applied methodology will also support shaping proper social, family, neighbourhood and local bonds. The main assumption of the designed workshops is mutual voluntary work of the multi-generational community of Siemianowice Śląskie which would aim at building street gardens, playgrounds and labyrinths for children. Such a system of nature protection and shaping the environment would be realized in cooperation with young people from Germany and Austria, from the
Waldorf schools in which care about the Earth and cooperation represent the main value of education. The participation of the youth from abroad would become another factor motivating to cooperate, study foreign languages and learn openness for and tolerance of cultural diversity. The trainings would include 2 programmes: ecological and psycho-preventive, with the latter taking place during breaks between ecological classes. The implementation of the project ought to be preceded by a careful diagnosis of social problems of the area of Siemianowice Śląskie. To sum up, the main aims of the project are: to preserve and work in aid of the Earth, activate the local community, change unhealthy social attitudes, and strengthen social, neighbourhood and local bonds.

Completely different aspects of social work are presented in the project by Katarzyna Thiel entitled Voluntary Service in Work with Family with the Problem of Helplessness in Child Care – and Upbringing-related Issues. A Social Project on Example of a Family Assisted by MOPS (Municipal Centre of Social Assistance) in Ruda Śląska [Wolontariat w pracy z rodziną z problemem bezzadności w sprawach opiekuńczo-wychowawczych. Projekt socjalny na przykładzie rodziny objętej pomocą MOPS w Rudzie Śląskiej]. The main aim of the project based on the cooperation of a family with a volunteer is to strengthen child care-related and educational actions of the family affected with such a problem. The role of the social worker would be assigned a function of an advisor, teacher and consultant to the volunteer who would be directly engaged in providing support for the family.

The family that was chosen for the project, apart from the dominating problem of helplessness in upbringing and educating children, was also affected by the issue of the unemployed mother and alcohol addiction of the father. There were three children in the family. The work of the volunteer was expected to last up to one year and would have the form of systematic meetings. The main aim of his/her activity is to assist by improving communication between members of the family by establishing a positive image, improving self-esteem of every individual family member and through building a sense of safety in the family. The volunteer would also have the task of improving pedagogical culture of the parents and providing them with any essential knowledge or information. An important element of his/her actions is also to organise the family’s free time so that they can spend it together as much as possible, and to strengthen their habits and skills of organising constructive leisure activities, doing homework and simply being together. Finally, another task of the volunteer is to shape important skills such as time management skills, prioritising daily duties of both parents and children. By bringing positive exemplars of social behaviour, and encouraging the family members to various forms of mutual outdoor activity, the volunteer should con-
siderably contribute to the improvement of the family’s integration with its closest environment.

One of a few projects employing the case work method is the one by Urszula Tadej entitled *A Drug Addict in a Penal Institution as a Case in Social Work* [*Narkoman w zakładzie penitencjarnym jako indywidualny przypadek w pracy socjalnej*]. The author of the project has made a diagnosis of the situation of drug-addicted convicts. She has mainly concentrated on prison drug addiction treatment – it is implemented within 10 addiction treatment units, which function as special units directed only at the group of prisoners who need application of special medical and educational measures. The project is addressed to people put in custody in Bytom, who are staying at the detoxification unit of the local hospital.

The author expresses deep conviction on the need for social work in penal institutions, proves it with firm arguments, and finally outlines a project of delivering help to a convicted drug addict. The project presents a plan of activities with the drug-addicted prisoner that should be task of the social worker. It includes an initial interview, meetings twice a week during the stage of diagnosing the situation of the convict, establishing contacts with the family of the prisoner and institutions dealing with addiction treatment, and last but not least, consultation with workers of addiction treatment institutions, volunteers and anonymous drug addicts. The fundamental aim of the described actions using case work method is to motivate the drug addict to undergo addiction treatment.

Another social project that assumes the use of case work method is the one by Ewa Leśniak entitled *How to Live with Stigma? Alcoholic Polineuropathy – Case Work* [*Jak żyć z piętnem? Polineuropatia alkoholowa – praca z indywidualnym przypadkiem*]. It is worth noticing the specific situation of drawing up a project and realizing it at the same time. The author took active part in planning and delivering help to a young, abstinent alcoholic assisted by MOPS (municipal centre of social assistance) in Zabrze after discharge from the Psychiatric Hospital in Toszek. A detailed case history, diagnosis and analysis of its situation have been presented in the project. Based on these, fundamental aims of help have been defined such as establishing contact with the society, adjustment to new conditions of living in sobriety and to the situation of health complications. A detailed plan of cooperating with and delivering help to the patient, which contains procedures essential to proper course of intervention, has been presented. The author conducted numerous interviews with the patient, his doctors, social workers from the hospital in Toszek, his neighbours, closest relatives and with other patients who stayed with him at the same help centre. Her observations were always consulted with a social worker who was personally responsible for working with the patient. The basic
tasks of the social worker, in which the author took active part, included: case management (development and coordination of the project), delivering necessary information and knowledge (defining possibilities and securing necessary means for the patient), searching for resources (creating new resources; broadening, improving and allocating them) and therapeutic interventions (encouragement and support for the patient to solve developmental problems with behaviour and interpersonal relations).

In the project by Katarzyna Błaszczyk entitled *An Individual Programme of Getting out of Homelessness in the District of Ustroń* [Indywidualny program wychodzenia z bezdomności na terenie gminy Ustroń], a suggestion of assistance actions was based on the analysis of a situation of people staying at the House of Homeless People in Ustroń. The project is aimed to help homeless people in becoming self-dependent by means of institutional resources and their individual psychological and social ones. The method used to accomplish this aim was developing individual programme of getting out of homelessness. The programme begins with social, demographic diagnosis of the person. It also includes such elements as: self-assessment of the reasons for being homeless, attitude towards being homeless, and self-assessment of possibilities to get out of the situation. An important element at this stage is to get to know the history of the family, the present situation of the family of procreation and relations with the family of origin. Finally, the diagnosis also includes any resources of the patient that may appear to be helpful during the process of getting out of the homelessness. The plan of proceedings during work with a homeless person would consist of actions such as: assistance in obtaining necessary documents, getting health insurance, registration in PUP (Poviat Employment Office); help in addiction treatment, finding employment, legal advice; help in establishing contact with the family; help in receiving pension, unemployment benefit or alimony; help in finding permanent place of residence. Last but not least, the programme of individual help assumes making therapeutic help available to the patient and then introducing it into social skills training groups, support groups and training groups who focus on methods of active employment search.

The aim of the project *Creating a Social Worker Position within the Municipal Hospital in Ruda Śląska* [Utworzenie stanowiska pracownika socjalnego w szpitalu miejskim w Rudzie Śląskiej] developed by Lilianna Długosz-Kmieć is to provide sick people who are undergoing hospital treatment with quick, interventional (welfare) action and help them join the system of social assistance.

The creation of a position for a social worker in a hospital is supposed to address patients’ needs such as: necessity to satisfy existential needs (especially after
discharge from a healthcare institution, when the person needs help of social assistance institution to secure meals at an eating-house, or to secure a place to stay for the night; satisfying the need of safety (in this case, the social worker supports the hospital staff); care about self-respect; satisfying the need of communication and contacts; or satisfying the need of information (primarily, information on resources which the client may benefit from). Apart from individual needs, a crucial justification for creating the position are the needs of the very hospital within the area of welfare, which should be delivered to people returning to hospital for social reasons. The social worker would be responsible for applying the proceedings of welfare organisations and for acting on behalf of the patient. Finally, the social worker employed in the hospital may help the hospital staff gather necessary information about the patient and advise the staff as regards the assessment of psychological and social functioning of the patient that is necessary for treatment.

Authors emphasize that complex social issues presented in their projects require taking multidirectional actions, therefore it is reasonable to appoint interdisciplinary groups within which a social worker would be one of many specialists who provide their knowledge at the stage of diagnosing a problem on a local scale. Owing to the manifoldness of the problems, students most frequently suggest simultaneous use of the group work method and the case work method, and simultaneous application of the method of working within a local community and the group work method.

3. Dominating role of group work in social projects

An analysis of students’ suggestions has led to a conclusion that the group work method has been suggested in the majority of projects; in most cases it was also the leading method or it contributed to a carefully planned supplement of either the case work method or the method of local community organizing. The interest in this method can be noticed both among the projects designed by our students and in the practice of welfare centres.

Social work with a group became recognised as a social work method in the 1930s\(^8\). It is defined as “a method of social work which through intentional, group experience helps individuals improve their social integration and deal with their

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individual, group and social problems better”. There are various models of the group work method that occur in the projects: the model of aggregate therapy (Gestalt), the model of developing social skills (including assertiveness trainings), the mediation model, the self-development model and numerous eclectic approaches (organisation model, socialization model) or detailed ones (the transaction analysis). Models that are put into practice depend on their theoretical assumptions and specification of the social problem.

Small groups are a meaningful resource for people that ought to develop their social competences, especially for those who experience ‘the feeling of helplessness and alienation. They perceive themselves as victims, they meet with incomprehension in relations with others or feel they do not have any influence on systems they are part of’. The aim of social work with a group is to raise the quality of living in the group. A social worker in this case deals with a particular and actual context of interpersonal relations. It should be kept in mind that group work requires specialised knowledge and professional skills of the social worker. It is also important to remember that the group is only a means of development and change of the main subject who is an individual. The individual is the one to benefit from all actions taken within the group. The social worker applying this methodology is required to: be able to establish positive contacts with members of the group; consciously concentrate on needs of the members and on aims worked out by the group itself; be able to actively involve all members of the group; be engaged in solving problems of the group; support and stimulate but not interfere with solving the problems which may be easily solved by the group itself (permission for self-development); cooperate with the group in working out solutions but also independently make conclusions on the problem. It should be emphasised that the analysed projects present not only convincing justification of choosing the group work method, but also deep understanding of the complexity of a social worker’s tasks, which are considerably connected with applying the method.

The fact that so many social projects developed by our students are based on the group work method is especially valuable, since emphasis is placed here on the role of the social worker as a person doing social work rather than taking him for a man-

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10 Ibidem, p. 144.
11 B. Dubois, op.cit. p. 159.
13 B. Dubois, op.cit., p. 159.
ager and a deliverer of welfare benefits and available resources. The latter description is how his/her role is most commonly perceived by the clients of social services, thus their claims mostly concern the welfare benefits and resources. Concentrating only on this aspect of helping actions is the reason for the mostly unfavourable process of addicting the clients to social services and leads to strengthening their social helplessness. A change of proportion to social work’s advantage may therefore significantly increase chances of achieving the most important goal of social help, that is guiding its clients to independently and successfully deal with hard, life obstacles.

As regards the necessity to reduce effects and range of social problems, an essential feature of the discussed projects is that they are designed in the context of small, local communities. Not only does this allow to respond to a definite demand, suggest solutions that best fit a particular situation and flexibly react to its changes, but it also presents a crucial element of counteracting seclusion and marginalisation of individuals afflicted with social problems. Mobilization the local community’s and neighbours’ potential, and establishing new relations and bonds of a client with his/her environment will not only be an invaluable help in implementing the help process, but probably after it has ended, they will remain a long lasting element of life of the individual.

Having mentioned all these advantages, one should also point out an extremely important and topical economic aspects that mean the possibility to deliver help to greater numbers of people. Despite the fact that financial criteria for choosing a cheaper methodology is not any basis and cannot be of a higher priority than content-related premises, they undoubtedly still are an advantage that raises attractiveness and legitimacy of choosing the group work method in helping people.

4. Realization of social projects in practice

Last but not least, we would like to stress that a substantial part of projects designed by our students are either ready to be realized or have already been realized. This is a fact not only in case of part-time students, many of whom work in welfare centres and therefore have adequately bigger possibilities, but also in the case of full-time students. There have been many instances when managers of welfare centres, on the basis of which students prepared their projects, showed interest in implementing the students’ ideas in their institutions. This means that the demand for this kind of social services is increasing.

We have also made an attempt to examine to what extent the projects by our students have been put into practice in whatever way. We have requested information
on the implementation of our students’ projects from a few dozens welfare institutions, with which we co-operate. We have received information on a dozen or so such cases, but unfortunately many institutions have not replied. Below, we present a few projects, that either were implemented or are being implemented in a serial or continuous mode. In many letters that were sent as a reply to our request, whether the projects by our students were implemented or not, the fact of the students’ employment and good preparation for work was stressed. They are mostly appreciated for their good education, professionalism and involvement. It is also worth noticing that there are projects, which, despite not direct implementation, are an inspiration and a basis for various programmes realized in a broader scope. Sometimes they are included – either partially or entirely – into local systems of helping various categories of clients; in local or community programmes of social assistance and some even get included in poviat strategies of solving social problems.

Among the realized projects, there is the concept by Ewa Górska, who is an initiator of the foundation of the Centre for Mediation in Żory, which mediates as commissioned by courts, public prosecutor’s office and penal institutions (*Mediation as Remedial Justice – Mediacja jako sprawiedliwość naprawcza*). Another implemented project also in Żory, which has attracted the attention of the Polish Ombudsman for Children, is the project by Katarzyna Karczówka *School Mediations as a Way to Solve Conflicts in School Community in Żory* [*Mediacje szkolne jako sposób rozwiązywania konfliktów w środowisku szkolnym w Żorach*] is a programme which considers mediations as a way to solve conflicts at school. After consultation with the Silesian Superintendent of Schools, some efforts have been made to introduce the programme into other institutions of the region.

The project by Adam Kincel realized in the Poviat Family Support Centre in Racibórz is entitled *A Support Group for Foster Families Assistants* [*Grupa wsparcia dla opiekunów rodzin zastępczych*]. Some ideas from the project are also applied in support programme for natural families and in trainings for step families candidates.

The project by Artur Kulas entitled *Flats for Redecoration for People that Became Homeless as a Result of Mental Illness or Mental Disturbances* [*Mieszkania do remontu dla osób, które w wyniku choroby psychicznej lub zaburzenia stały się bezdomne*] was implemented in the Municipal Centre of Social Assistance in Bielsko-Biała. Thanks to the project 4 people who were at risk of becoming homeless, found their place to live in self-contained flats. Moreover, the author is involved in further projects concerning similar social issues, which also happen to be realized in the Centre in Bielsko-Biała.

An important problem of violence against children was addressed in another completed project by Cecylia Mokrus *The Debate on Preventing Child Abuse in*
Piekary Śląskie [Debata na temat zapobiegania krzywdzeniu dzieci w Piekarach Śląskich].

On the basis of the project by Ewa Wiwat Support Group as a Structure that Satisfies the Need for Acceptance of Mentally Disturbed People [Grupa wsparcia jako struktura zaspokajająca potrzebę akceptacji osób zaburzonych psychicznie], a programme Social Integration of People with Disturbed System of Adaptation in their Local Community has been realized in the Centre for Social Rehabilitation and Counselling for the Mentally Disturbed in Katowice. The programme has already had its new edition.

Another project that is put into practice and addresses the issue of support groups is a project implemented in the Integration Centre Senior in Czeladź (Jolanta Waśko Support Groups for Seniors in the Integration Centre Senior in Czeladź, 2002 – Grupa wsparcia dla osób starszych w Ośrodku Integracji Senior w Czeladzi). In the same Centre, a project by Renata Szabelak entitled Socio-Cultural Animation in the Day Care Centre in the Integration Centre Senior in Czeladź [Animacja społeczno-kulturalna w Dziennym Domu Pomocy Społecznej Ośrodka Integracyjnego Senior w Czeladzi] is also realised.

The Municipal Centre of Social Assistance (MOPS) in Ruda Śląska is one of the institutions that benefits from the output by our students very intensively. It also employs 15 graduates of the Social Work Department. Among the numerous projects implemented in help programmes for various groups of clients (either partially or entirely), one can find projects treating social work as an instrument of helping: the homeless\textsuperscript{14}, the people with disabilities\textsuperscript{15}, seniors\textsuperscript{16}, women\textsuperscript{17} and many others\textsuperscript{18}.

\textsuperscript{14} Justyna Szczepaniak, Schronisko dla bezdomnych mężczyzn [A Shelter for Homeless Men]; Lidia Białkowska, Mieszkanie chronione dla bezdomnych mężczyzn [A Protected Flat for Homeless Men]; Piotr Walerysiak, Grupa wsparcia dla bezdomnych mężczyzn [A Support Group for Homeless Men]; Halina Ignor, Grupa wsparcia dla bezdomnych uzależnionych od alkoholu [A Support Group from Homeless People Addicted to Alcohol]; Joanna Piksa, Ośrodek interwencji kryzysowej dla osób bezdomnych [A Centre of Immediate Intervention for Homeless People].

\textsuperscript{15} Anna Smyła, Organizowanie pomocy dla rodzin dzieci niepełnosprawnych [Organising Help for Families with Handicapped Children]; Joanna Wyciślik Grupa wsparcia dla rodzin dzieci z porażeniem mózgowym [A Support Group for Families with Children with Cerebral Palsy].

\textsuperscript{16} Danuta Polczyk, Mieszkanie wspólnotowe dla seniorów [Community Flat for Seniors].

\textsuperscript{17} Agnieszka Curlej, Grupa wsparcia dla nieletnich matek [A Support Group for Minor Mothers]; Nina Grzyk, Grupa wsparcia dla kobiet w sytuacji przemocy [A Support Group for Abused Women]; Izabela Trutwin, Grupa wsparcia dla bezrobotnych kobiet [A Support Group for Unemployed Women].

\textsuperscript{18} Kornelia Kowalczuk, Świetlica socjoterapeutyczna przy szkole podstawowej [Socio-Therapeutic Hall at Primary School]; Sonia Borowicz, Klub Trzeźwego Małolata [The Sober Teenager’s Club]; Joanna Koniczna, Ośrodek pomocy współuzależnionym [The Assistance Centre for the Co-Addicted]; Ewelina Sówka, Zasady współpracy z organizacjami pozarządowymi [The Rules of Cooperation with Non-Governmental Organisations].
We are convinced that the interest in the group work methods, showed in the above examples, on the one hand, has been a result of a complicated situation of clients, and on the other, a sign of the constantly rising level of professionalism in social work as regards knowledge and its derivative skills. A number of the implemented suggestions were directly connected with actions undertaken by the above-mentioned centres of social assistance. These social assistance centres take innovative actions in order to help their clients become self-dependent. This may mean that empowerment as the form of help within social work is becoming more and more sought-after since it not only counteracts the phenomenon of seclusion and reduces unfavourable symptoms of institutionalisation, but also contributes to the much more humane and decent image of the system of social assistance, which is also due to the professional attitudes and values of social workers.

5. Conclusion

The presented social projects are only a small particle of the diploma projects which have been prepared at the Social Work College\textsuperscript{19}. They have enabled the illustration of a variety and topicality of issues undertaken. They have also reflected the level of knowledge, orientation and awareness of students who very often prepare very interesting and innovative suggestions for actions which have a chance to be fully or partly realized. Finally, thanks to the designed projects, we have the possibility to verify the competences and skills of students, which are a significant factor in the process evaluating the course of their education.

The necessity of detailed action planning requires creative reflection and identification with a problem from the students, which in turn, influences the development of professional identity, which means “a community of objectives and principles of actions in a profession, it has got a developmental character (...). Emotional identification, rationalization (connected with intellectual evaluation of psycho-social stimuli, evaluation of one’s own professional abilities) and readiness to undertake actions, their acceptance and adaptation to conditions of functioning in the profession and internalization of values (...) are very important in particular phases of the process of professional identification”\textsuperscript{20}. It seems that de-

\textsuperscript{19} In the last 5 years about 100 graduates (of both full-time and extramural courses) have been granted the Bachelor’s degree entitling them to work as a social worker. Previously, it was even over 200.

\textsuperscript{20} A. Kurcz, \textit{Poczucie tożsamości z zawodem pracowników socjalnych} [Sense of Identity with the Profession of Social Workers] [in:] \textit{Pracownik socjalny. Wybrane problemy zawodu w okresie trans-
signing plans of actions in the form of social projects is relevant educational prac-
tice allowing students to apply theoretical and practical knowledge acquired dur-
ing the course of studies in practice. Moreover, it motivates them to think
creatively and contributes to the very sense of the education process. The actual
effects of students’ actions are often surprising for themselves, and this aspect ac-
tuality of their work encourages their further development in the direction of
providing professional support and to continue their actions.

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SUMMARY

The aim of the following article, which addresses the issue of seeking standards on education for the profession of the social worker, is an attempt to focus on the abilities to employ the professional competences of the social worker in practice, at the Social Work College in the Institute of Sociology, University of Silesia in Katowice. The article contains an analysis of a series of social projects, designed by students, to professionally help individuals, families and communities overcome their life difficulties and regain their abilities to manage them independently in the future. The principal elements of the analysis of the supportive actions suggested in the projects were: methodological action, choice of methods of social work and suggested solutions to social problems preceded by a diagnosis of deficiencies and resources of individual local communities.

The conclusions drawn after the analysis pertain to the dominant methods of social work applied in the implemented solutions, conditions for connecting a few methods and conclusions on the roles of the social worker, realized in the planned actions. The clear dominance of functions and roles connected with modern, supportive social work proves that the range of professional roles of the social worker extends, and is not limited to the role of the resources administrator only. In addressing the discussed issues, additional data were collected. These data reflected outcomes of the sample projects implemented in practical solutions to actual social problems, providing feedback on students’ competences and skills in integrating the theoretical knowledge with practical actions.

Key words:

Social work, social project, a professional, methods of social work, social work practice
NEW DIRECTIONS IN PSYCHOLOGICAL RESEARCH ON CULTURE

1. Characteristics of psychological research on culture

Cross-cultural psychology is a relatively new branch of psychology. Triandis\(^1\) recalls that, at the beginning, psychological research on culture was neither popular nor received by the members of the scientific world as well as it is now. As time passed, investigators began to see the importance of the influence of culture on the psychological variables that are studied. It has led to the emergence of various branches of (cross-)cultural psychology that differ importantly from one another. Treating psychological research on culture as a homogenous field of study is inappropriate and prevents one from grasping the particulars of the entire field. At least three types of cultural psychology\(^2\) can be distinguished. The first is cross-cultural psychology, focused on finding cultural factors that can explain the differences observed in the functioning and psychological properties between representatives of different cultures. The second type is intercultural psychology, whose primary object of interest is what takes place at the point of contact of cultures; in other words, what happens when representatives of distinct cultures interact, in-

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cluding – as argued by Price-Williams – the effect on investigations on culture resulting from the investigator’s own culture. The issues and theoretical considerations concerning multiculturalism fit into this trend in psychology. A particular problem with the Polish language is the lack of a separate word that can properly differentiate intercultural psychology from the cross-cultural one. English has the precise expressions intercultural and cross-cultural psychology, as well as simply cultural psychology. This is the third type of cultural investigation, whose object is “to discover the psychological diversity of people in the context of the worlds they create.” Cultural psychology highlights the purposiveness of human activity and the reciprocal influences of culture and psyche. Researchers conduct investigations in the spirit of this type of psychology in which subject to the analysis are elements unique to the selected culture, not necessarily to be found in others. An example of the cultural approach to psychology can be the work of Szarota, in which the analysis was concerned with smile – its types and meaning from the perspective of selected cultures.

2. Phases of research in cross-cultural psychology

Matsumoto and Hee Yoo described the evolution of trends in cross-cultural psychological research based on Michael Bond’s work, in which he distinguishes three phases of research in cross-cultural psychology and proposes a fourth phase for such investigations. The first phase concerns cross-cultural comparisons. Researchers previously treated the country that was the subject of research as an independent variable. This research was quasi-experimental, and made a significant contribution to the acquisition of information on cultural diversity and the details of psychological processes that were previously viewed as universal. The second phase of research was the identification of dimensions that enabled the explanation of diversity between various cultures. This phase of research resulted from the oft-repeated mistake of cultural attribution fallacy which, as Matsumoto and Hee Yoo

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4 P. Boski, op.cit., p. 33.

5 Ibidem, p. 36.


write, consists in concluding that differences observed between two groups from different cultures (often just different countries) should be attributed to undefined cultural elements\(^8\). The problem is twofold: firstly, the influence of factors external to culture (such as religion, education, affluence) on the observed differences is ignored, and secondly, the basis of differences between national cultures is not identified.

The second phase of research is then characterized by the emergence of the first works that attempted to find answers to questions about the source of observed differences between representatives of selected cultures. A work of enormous significance for the development of investigations into cross-cultural psychology was the book published in 1980 by Hofstede\(^9\). This researcher first differentiated four basic dimensions of culture (individualism/collectivism, masculinity/feminity, uncertainty avoidance and power distance), and later on added the fifth dimension: short-term/long-term orientation (in cooperation with Bond). National cultures can occupy various positions in each of the dimensions presented, which enables good understanding of each of them. Hofstede’s dimensions made it possible to find explanations for differences between selected cultures. The researcher’s work resonated deeply in psychological investigations of culture. Since the initial work, there has been a great number of publications focusing on the dimensions discussed by the researcher, in which those dimensions serve as independent variables in the search for differences between representatives of cultures in a selected area of human functioning\(^10\).

The third phase in cross-cultural research was the focus on investigations of cultural dimensions. A certain limitation of which researchers were accused of at the time was using the description of a cultural dimension instead of the description of a country, without the additional search for reasons for the observed rela-

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\(^8\) Ibidem, p.235.


The investigations by Markus and Kitayama helped research to seek mediators of the observed phenomenon. The types of self-construals as described by the researchers fulfill the function of a mediating variable between the dimensions of culture and the particular phenomenon/behaviour under examination. The third phase of research is characterized by cultural studies, understood as “rich descriptions of complex theoretical models of culture and self that predict and explain cultural differences.” The researchers, apart from self-construals, also analyzed morality, the need for self-esteem and cognitive styles as mediators.

Matsumoto and Hee Yoo postulate that the next step of research be focused on “linkage studies.” This phase should be an expansion of the previous third phase. The researchers opt for the search for all differences and their potential explanations not to be based on theoretical speculation, but rather on empirical verification of proposed models. It occurred that a researcher, when trying to explain differences in the level of a particular variable, referred to the culture from which the sample under investigation comes from, with the assumption that it should be characterized by a given dimension and certain practical implications bound up with those dimensions. Empirical verification of the assumed implications was passed by, which does not allow authoritative conclusions on the likely sources of observed differences.

The authors also remark that research should take into account the variables of demography and ecology, such as climate, which can have a significant effect on intercultural differences. Furthermore, psychological variables such as aggregate differences in personality (i.e. based on the five-factor model of personality described by Costa and McCrae) can also be the basis of intercultural differences. Moreover, the researchers encourage investigators to take into account other cultural dimensions besides those described by Hofstede; Leung and Bond’s social axioms can be useful in explaining intercultural differences, as well as the expanded cultural dimensions described in The GLOBE project. Another

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13 D. Matsumoto, S. Hee Yoo, op.cit., p. 236.
14 Ibidem, p. 236.
important issue is maintaining the equivalence of tools used for measuring selected characteristics in cultural differences. As the researchers state, it is not enough to be concerned with the proper translation of a tool, but it is also necessary to check if the factors present in subjects’ answers are consistent with those present in the original version of the tool. A valuable postulate is to encourage experimental research grounded in cross-cultural psychology\(^{18}\). An example of such research is the work by Levine on willingness to offer help to strangers in various cultures, conducted as natural experiments\(^{19}\). Due to the often low level of consistency of declarations with behaviour, this line of inquiry could be an excellent complement to the “paper and pencil” cross-cultural research conducted to the present time.

New directions in cross-cultural psychological research can benefit a great deal from the already documented knowledge on cross-cultural research methodology. In such investigations, it is crucial to keep in mind the distinction between the cultural and the individual levels of measure\(^{20}\). Researchers aggregate individual results (e.g. the average result of responses to a question in a particular culture is taken into account), which often brings different results at the cultural and individual levels. This is well illustrated by the example of divorce and satisfaction with life as remarked on by Boski, where at the individual level the well-being of a couple that is getting a divorce is low, but at the cultural level those countries that have a greater rate of divorces are happier\(^{21}\).

It is also necessary to state that psychological investigations into culture will go beyond the area of “pure psychology”. They are the subject of interest of sociologists, linguists and anthropologists. Their perspective will vary from the method in which psychology is conducted (especially as regards the choice of tools or particular subject of interest). One difficulty that seems to be common to all investigations on psychological aspects of culture is the manner of expressing the subject of research. It is extraordinarily important to ensure that a researcher explores the same psychological phenomenon in various cultures. It is indeed possible that


\(^{21}\) P. Boski, op.cit., p. 47.
the same phenomenon is called differently in different cultures (which is not due to the simple fact that they are different languages), as well as that different phenomena have similar or the same labels. The investigator must be certain that the subject of their work is understood similarly in the culture that the content of the test is presented. We deliberately use here the word “similarly” and not “exactly the same” as it is not always possible to find a word-for-word translation of a definition. Wierzbicka cites examples of words from Polish, such as ludzki – which roughly translates as “humane” – that have no counterpart in other languages. This forms a serious barrier to cultural investigations. The researcher can exercise caution in presenting a tool in a new culture by taking care to ensure its proper adaptation, as has already been mentioned. Besides translating into a given language, back-translation or corrections of differences, adaptation should also allow for the specifics of a given culture, which often takes the form of adjusting certain test questions to make them more appropriate for a culture. Detailed, practical tips on adaptations of psychological tests were described in a work by Van de Vijver and Hambleton. When an investigator constructs his/her own tools, it is possible to add a question to ensure that the content presented is understood in the same way as the investigator assumes. Such a method was selected in research by Cantarero on cross-cultural differences in the acceptance of lying. Test subjects are presented with social situations where lying takes place, and are asked to define the extent to which they perceive a situation as a lie. This allows the researcher to be sure that the tool is presenting a real falsehood, independently of the culture to which the subject belongs. That said, not always such measures are possible owing to the form of the tool or subject of investigation.

3. The Internet in psychological studies on culture

New directions and tendencies in cross-cultural research are tightly linked with the use of new technologies for conducting such studies. This is connected with the growing presence of new media in people’s lives, a natural consequence of

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22 A. Wierzbicka, Information Given during a Lecture Organized as Part of the Cycle “Wyzwania Humanistyki XXIw.” [Challenges of the Humanities of the 21st century], 27.09.2010, Warsaw School of Social Sciences and Humanities, Poland.


which is the possibility to use them in various types of social research. The data on Internet use are promising – the number of people online is growing year after year around the world. In 2007 over 55 out of 100 people in industrialized countries used the Internet, and in developing countries this was nearly 13 out of 100. The global average is over 20 out of 100. A breakdown of regions shows that the highest percentage growth of Internet users has taken place in Africa and the Middle East, where previously only a small fraction of the population had Internet access (in 2000, the Middle East was home to just over 3,000,000 Internet users, but in 2009 this number grew up to 57,500,000 – an increase of over 1,500%). The smallest increase in the number of Internet users during this period (2000–2009) took place in regions with a high proportion of users in relation to the total population (Europe – increase in the number of Internet users of nearly 300%, North America – growth of Internet users of 130%). This dynamic growth tendency in the number of Internet users in regions previously characterized by a low percentage of people online may mean an increase in the researchers’ access to research subjects from such areas as Africa and the Middle East, where researchers from the West didn’t use to operate so often in the past.

Carrying out studies via the Internet would seem to greatly facilitate the task of conducting psychological research on culture. The possibility of access to over 1,700,000,000 people from various cultures in their own environment would appear to fulfil the dreams of every researcher targeting the cultural aspect in their work. That said, many difficulties must be overcome when desiring to use the Internet as a medium for conducting research. These difficulties concern both questions of technology and practicality, as well as of substance and methodology. Certainly, such problems are associated with the small number of psychological measurement tools designed for online use. The majority of such tools at the disposition of researchers are designed as “paper and pencil” means, and only in such research conditions (standardization) can we expect a similar level of reliability and accuracy, along with the possibility to refer to current standards. There is also the problem of the security of information obtained from research subjects and the security of the tool itself. Information on research should be safely transmit-

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26 www.internetworldstats.com/stats.htm [access: 15.03.2010].

ted to a database and safely stored in it. Tools, especially those for psychological diagnosis, should be available exclusively to individuals authorized to use them, and if they are available online, there is a possibility they are intercepted by persons not entitled to access them. Intellectual property rights must also be allowed for, as well as material rights of the authors of the tools we apply.

Another difficulty in conducting Internet-based research is recruiting subjects for studies. Such recruitment takes place non-randomly by means of the “snowball” method, where study participants recommend taking part in a research to their acquaintances. A similar non-random selection takes place when a study is announced on various portals, thematic fora, etc. However, this seeming drawback could also be a deliberate tactic when we seek to reach and study a particular group, such as immigrants. Yet, in this manner, we reach only those immigrants who have most likely come across such portals or fora for individual reasons. There are also random methods of inviting individuals to participate by means of pop-up windows, which every Internet user has certainly seen. This is a costly method (research companies generally offer such services) and is often viewed as an annoyance by the Internet users themselves.

In focusing one’s research on Internet users, it is necessary to keep in mind that they may form a unique group as regards social, demographic and psychological characteristics. For example, in undertaking research on Polish Internet users, we have a greater chance of encountering an individual either attending school or already possessing at least secondary-school education. This individual will also most likely be a man, although at present the difference is not so great (i.e. in 2009, Polish Internet users were 52.8% men and 49.2% women). Such an Internet user will most likely live in a city with population over 100,000 (although, increasingly, in a smaller city or rural area – these differences are systematically decreasing), and will be between 16 and 44 years of age. Therefore, we should expect a sample of Internet users not to be so representative of the population, in socio-demographic terms, and quite different from those who do not use the Internet.

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28 This may constitute an uncontrolled variable which could unintentionally result in the falsification of the results of research conducted. A solution may be to collect data from various fora, portals and Web pages, or to conduct a precise socio-demographic survey or one concerning the psychological characteristics of test subjects.


30 Ibidem.

31 This is true for Poland, but it is likely that such disproportions will be markedly smaller in countries where the proportion of Internet users in society reaches 80–90% (Scandinavia).
Some studies have also shown that Internet users’ psychological functioning and characteristics may also differ from those not online – these differences are related to the intensity and length of Internet use\textsuperscript{32}. It is accepted that Internet users are more socially active, more satisfied with life\textsuperscript{33} (except their satisfaction with place of residence) and usually feel less lonely\textsuperscript{34}.

In the case of studies conducted via the Internet, we also lack the possibility to manage or equalize the conditions in which various subjects are studied (limitations in standardization). This limitation includes not only the physical conditions of a subject’s environment (private room, Internet cafe, library, etc.) but also unfamiliarity with the type of computer and programming installed and used by the subject\textsuperscript{35}, which can result in our research tools appearing differently to users of different software or even failing to function in different environments. This is of particular importance as studies make use of visual and audio elements that have an effect on the proper collecting of results\textsuperscript{36}. However, these varied research conditions can be characteristic of the social and cultural environment in which an individual lives, and as such may increase the external reliability of the study (lowering internal reliability). It is worth noting as an aside (while the matter itself is of no small importance) that when conducting research via the Internet, we are not in a position to control the psychological state of the subject. It can occur that a participant in a study can be in an altered psychological state, such as being under the influence of psychoactive substances or strong emotions, etc. During research by means of traditional methods, we as researchers are able to detect and properly react to such circumstances, which is not possible during Internet-based research.

The last significant issue connected with research conducted over the Internet is the reliability of data and its completeness. The latter matter is simpler to solve – there are programs “forcing” and “reminding” about giving answers to each question; otherwise they do not allow the user to proceed to later stages of research. The former issue, concerning trustworthiness, is more difficult to solve. Conducting research over the Internet, one can encounter people pretending to be other individuals or subjects taking the same test multiple times. There are of course ways of monitoring such instances (e.g. one-time passwords to access the study)\textsuperscript{37}.

\textsuperscript{32} K. Henne, \textit{Internet – nowa technika badań w psychologii} [The Internet – A New Technique of Research in Psychology], “Nowiny Psychologiczne” [“Psychological News”] 2004, No. 2, p. 15.

\textsuperscript{33} J. Czapinski, T. Panek, op.cit., pp. 301–303.

\textsuperscript{34} K. Henne, op.cit., p. 15.


\textsuperscript{36} K. Henne, op.cit., p. 17.

\textsuperscript{37} Ibidem, p. 26.
The unquestionable advantages of data collection from research subjects by means of the Internet are as follows:

1) quick contact with potential subjects (from invitation to participation in the study just seconds can pass);
2) speed of transfer of data to statistical computation packages (data from the Internet are gathered in digital form, thus inconsistencies resulting from errors in data recording in the statistical package can be eliminated);
3) low research costs (possibility of independent survey creation by means of free programs and databases such as: www.ebadania.pl, www.ankietka.pl, subprograms in Gmail allowing the creation of simple survey forms, etc.);
4) possibility of reaching people all over the world and conducting research at times convenient for subjects (independently of physical barriers such as distance, time zones or barriers causing difficulties for the physically disabled)\(^\text{38}\);
5) possibility of reaching groups difficult to reach offline\(^\text{39}\) (such as groups of common interests, e.g. lovers of underground art, or of common problems, e.g. parents of special needs children);
6) minor influence of social approval due to the increased likelihood of remaining anonymous;
7) no impact of researcher’s expectations, which can be transmitted during research conducted face-to-face – known in the literature as the Rosenthal effect\(^\text{40}\) – which can have a significant distorting effect on the results of academic and diagnostic research;
8) high reliability of results of online surveys originally designed for offline use – reliability comparison by means of the analysis of data obtained by “paper and pencil” methods and by the electronic ones. It can actually be claimed that data gathered via the Internet are practically indistinguishable from those gathered by traditional methods, such as in the laboratory\(^\text{41}\). The advantages listed in points 3, 4 and 5 are especially important from the perspective of the cultural researcher.


\(^{39}\) Ibidem, pp. 123–133.


4. Conclusion

Regardless of whether one is a supporter, sceptic or opponent of Internet-based research, it must be acknowledged that this method of psychological research on culture will become widespread in the future, if not dominant. In order to use the Internet in conducting cultural research (and in other areas of social sciences), one must remember that Internet users have not (yet?) constituted a representative sample of the population, and as regards our target group of subjects and whom we wish to generalize the results, it is worth knowing who uses the Internet in the society, culture or region under study. New directions in psychological research on culture signify changes in both the theoretical approach to research (its subjects/objects) and the practical ones – the methods of conducting such research. New technological solutions allow new theoretical approaches to be easily and quickly verified. This can also contribute to the increase in knowledge about culture and its psychological aspects.

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SUMMARY

The paper focuses on two aspects of new directions in psychological research on culture. On the one hand, these are new trends in theoretical framing of the subject matter of research. The evolution of research in cross-cultural psychology is being analysed, showing probable future trends of this research. On the other hand, the paper contains the analysis of using Internet in cultural studies. Some benefits and threats that result from using Internet as means of communication are presented.

Key words:

Research on culture, cross-cultural psychology, Internet
At the beginning of April 2011 in Warsaw, a three-day international conference entitled: Contemporary Social Policy was organised by the Higher School of Pedagogy of the Society of Public Knowledge in Warsaw (WSP TWP). The conference was the summary of the scientific project Socially Responsible University which was implemented by WSP TWP between 1st April 2009 and 30th April 2011. The project was funded from the Human Capital Operational Programme, Priority IV Higher Education and Science, Measure 4.2 Development of skills of the R&D system staff and increasing awareness of the importance of research to economic growth.

The first objective of the project Socially Responsible University was to develop an innovative approach to social services within the working of four interdisciplin ary expert groups focusing on areas connected with: new multi-sector social policy, social pedagogy, social economy and corporate social responsibility, and to popularise issues relating to the influence of social policy on economic development. Expert groups working on 4 different publications on social services in the above mentioned areas consisted of researchers, representatives of the public sector and non-governmental and business ones, as well as students. Each expert group discussed the prospects for the development of the particular sub-disciplines. It enabled the next objective to be realised, namely the integration of circles dealing with social policy, in its broad sense, in Poland. The result of the effort by over 50 experts from the entire country was the publication of 4 books within the series New Social Policy, which were distributed free of charge around numerous
scientific, economic and public institutions, and amounted to 8,000 copies. The titles are:


The second objective of the project was the popularisation of the ideas by western scientists in the domain of social sciences by translating eleven foreign publications (from English, German, French and Hebrew). These were books until then not available on the market in the Polish language versions, and thanks to the project they have been popularised in scientific, economic and decision-making circles in Poland. The titles of the books translated and distributed free of charge (in total of 11,000 copies) within the series *Contemporary Social Policy* are as follows:


The third objective was the popularisation of the new approach to social policy by means of a professional interactive educational portal www.spolecznieodpowiedzialni.pl. [the socially responsible] with a rich content on the subject. The portal was the main instrument of promoting the activities within the project *Socially Responsible University*.

The conference that was the summary of the above activities, in which eight foreign lecturers participated, was an important event for the scientific circles and was attended by over 200 participants from Poland and abroad. The conference was opened by Prof. Julian Auleytner, PhD Hab., Rector of the WSP TWP, who welcomed the participants and guests. He pointed out that until that date, in Poland, there had not been such a large project (and conference) to popularise the scientific output by social politicians from abroad. Professor Auleytner highlighted the importance of the event and the need to begin a new scientific dispute after having read all the translated books in the context of implementing necessary changes to the system of comprehending social policy, but also to the system of social policy education. Also, he emphasised the quality of local, national publications within the project and the value added of the project, which was the integration of the younger generation of scientists around the major challenges of social policy in Poland. Presenting the main ideas of the translated books, the Rector thanked their authors for participation in the conference.

The conference was divided into three panels. The first related to the economisation of social policy in the context of contemporary demographic and family changes. In this panel, there were eight experts giving speeches, including four guests from abroad. The Polish panel moderators were Prof. Krzysztof Piątek, PhD Hab., and Prof. Jerzy Krzyszkowski, PhD Hab. The second panel considered social policy in Israel and aimed to show, the unknown in Poland, multicultural context of social issues which are actual in this country. Three papers were presented in this group, including two by foreign speakers. The moderator of the panel was Prof. Aldona Frączkiewicz-Wronka, PhD Hab. The third, biggest panel referred to social services provided within the multi-sector social policy. The panel was divided
into four parts: *Transformation of the Service Sector in Social Security System; Community Social Services and Local Social Policy; Reintegration Services in Social Economy;* and *Corporate Social Responsibility as an Element of Promoting Social Policy.* Individual parts of the panel were moderated by Prof. Józef Orczyk, PhD Hab., Prof. Andrzej Rejzner, PhD Hab., Mirosław Grewiński, PhD Hab., and Małgorzata Bonikowska, PhD.

The first panel began with the presentation by Prof. Irena Kotowska, PhD Hab., of Warsaw School of Economics, on the contemporary demographic tendencies and challenges as one of the most important problems of Poland and Europe for the forthcoming decades. In the paper, it was highlighted that a new phenomenon is emerging – which is *New Demography of Europe* which means that the population of Europe has lost its capability of balancing birth and death rates and this results in a new demographic situation of the future. There has been a change towards a very low or low rate of fertility, which is characteristic of many countries. Such continuing low fertility and a constant increase in life expectancy lead not only to a decrease or stabilisation of the population numbers of the continent, to the intensification of the population ageing process, but primarily to serious upsetting of the relation between the number of youngest generations, the population of the economically productive ages and the population of the oldest persons. At the same time, there is an increase in migration inflows and in the role of migration in shaping population transformations on the continent which has become a region of influx in the second half of the 20th century. According to Prof. Kotowska, in Europe and in Poland, there is an urgent need to promote demographic renewal, that is measures to increase the number of children born per woman if it remains at a level which considerably differs from the level which guarantees simple reproduction, but including immigration policy aiming at receiving and integrating immigrants.

The next paper was presented by Prof. Grażyna Firlit-Fesnak, PhD Hab., of the University of Warsaw, who presented the subject of *Family Policy in Poland – Issues to Solve* in which she displayed political and economic reasons for creating family policy in Poland. In the paper, she indicated several key issues relating to the role of the family in the contemporary Polish society and highlighted that its assets – the invaluable usefulness in creating the social order – as well as the determinants of its weakness. The author stressed the necessity to distinguish the priority domains and instruments of activities for the benefit of the family, which are to be perceived less in social categories and more in categories of efficient investments.

The next speaker was the first guest from abroad – Prof. Martin Powell of the University of Birmingham, who presented the issue of multi-sector economy of
welfare and the British Big Society which has been an important political idea of the conservative-liberal government in the UK since 2010, after the last parliamentary elections. As was stressed during the presentation, one of its basic hypotheses was departure from the so-called big government towards greater empowerment of the welfare society. In the context of the multi-sector economy of welfare, it means a transition from the state’s sector to the voluntary and informal one. Prof. Powell suggested that in order to analyse multi-sector economy of welfare in a more comprehensive way, one ought to employ the “three level analysis” which focuses both on benefits/services and on funding and regulation. In his presentation, the author compared the assumptions of the Big Society concept with the Third Way, an important political idea of the previous government – the Labour Party. It turned out that the Big Society and the Third Way share certain common points but there are also discrepancies between them. However, this great idea appeared to have some considerable analytical gaps and certain incoherence observed between the political discourse and the implementation of the policy that results from the discourse.

After the three presentations, in the discussion, which followed, an important voice was that of Prof. Jerzy Hausner, PhD Hab. – former Deputy Prime Minister and minister of economy and social policy. Prof. Hausner referred to all previous speeches pointing out that in order to effectively solve social problems, such as demography or family-related issues, it is necessary to perceive public management, including the social sphere, in a different manner that we used to in the past. First of all, at present, any country needs to be viewed within a broader global context; secondly, the welfare state has nowadays gained a completely different character that two decades ago; thirdly, we are now witnessing a greater and greater increase in institutional variety which results in greater and greater complexity of solutions and coordination measures. The numerousness of interactions at different levels requires new competencies and knowledge. There is a need for greater balance between economic and social policies. According to Prof. Hausner, the state has in fact very limited instruments of controlling the demographic and family-related processes. These changes are actually uncontrolled and one may react to them only partially. To implement reasonable long-term changes in social policy, it is essential to have strategic imagination, and in Poland, there is a deficiency of centres for strategic thinking.

The first paper after the break was presented by Prof. Irena Lipowicz, PhD Hab. – the Ombudsman in Poland. She presented an interpretation of the system provision of Art. 20 of the Constitution of the Republic of Poland which pertains to the principle of social market economy. Due to the fact that in Poland this provision
of the Constitution is very rarely interpreted, and it is crucial for the present model of social policy, the paper, which was based on the legal-normative approach, was highly inspiring on how to treat this provision of the Basic Law. Interpreting the provision, Prof. Lipowicz referred to the German Constitution which also contains such a provision. The conclusion of the paper was that social market economy is such economy which balances the social and economic objectives.

The next paper was presented by Prof. Nicholas Barr of London School of Economics who presented the subject: *Financing Social Policy on the Basis of Higher Education*. In the first part, the author characterised the changing environment of the functioning of higher education. This issue is becoming more and more important in times of increasing financial limitations. Prof. Barr indicated here three main objectives which ought to be realised by higher education: quality, access and size. In the second part, the author discussed the scope of financing higher education, beginning with a lesson on the theory of economics: competition between universities is profitable for the students, the graduates (not the students) ought to co-finance degree granting. In the third part, Prof. Barr presented evidence on the actual barriers in access to higher education, the majority of which emerges long before a person has attained the age of eighteen.

The next paper was presented by Adalbert Evers of the University of Giessen and was entitled *Investments and Social Measures – Opportunities and Dangers of the New Social Model in the West and East of Europe*. The original thesis by the author was that, as a result of the debate on social policy, which is ongoing internationally, and also within organisations such as the European Union and OECD, models of a new social paradigm to be applied both in the West and the East were developed. Also, the specific “social language” was developed. According to Prof. Evers, the five main assumptions of the new social paradigm are:

1. Orientation towards the investment approach to social policies.
2. Activation concepts as the dominant ones in contemporary discourse on social policy.
3. Complementarity of rights and responsibilities – nowadays citizens are used to many rights but they have too few responsibilities.
4. Strategies of inclusion instead of equality – today’s societies are not equal and they will not be such, thus new inclusion strategies are needed.
5. New types of joint social programmes and management of the network of inter-institutional relations – there is a need for pluralistic and multi-sector social policy with various stakeholders.

At the end of the first day of the conference, Prof. Peter Herrmann of the University College Cork presented the paper which in a philosophical way referred to
the subject: *Social Policy – Bonds and Social Capital instead of Benefits*. The author of the paper stated, among other things, that the capitalistic mechanism is oriented towards balancing demand with supply. However, the balance in the relation demand – supply actually refers only to the value of exchange. Contrary to this, the former term refers to the development of social dimension which is the result of interaction between individuals (appointed as subjects, or actors) and their community. If one assumes such a perspective, the content of social dimension refers to the overall productive and re-productive relations between people. In other words, the point is that the constitutive co-dependence of the self-realisation processes and the processes of collective identities formation is a condition for “social dimension” realised by the interaction between subjects (actors), who are able to act, considering their skills of self-reference and their frame structure which is directly translated into the context of inter-personal relations.

The first day of the conference finished with a formal supper. In the meantime, there was also press conference that was attended by many journalists and the media.

The second day of the conference was opened with a very interesting session on social policy in Israel in the context of multiculturalism. Prof. Aldona Frączkiewicz-Wronka, PhD Hab., who moderated the session, presented very new, and unknown in Poland, statistical data on the socio-economic situation of Israel and the role of social policy in this country. In the conclusion, she argued that Israel employees numerous, varied instruments and solutions in realising its own social policy, and this experience may be used by Poland and other European countries.

This session was attended by Prof. Shevah Weiss, former ambassador of Israel in Poland, who presented the subject: *Political-Social Problems in Israel*. In the speech, the author referred to the issues of Zionism, Post-Zionism, Territorial Zionism, the army and society. He presented the issues of the clash of religious, ethnic and national groups in Israel such as Jews, Arabs, the religious and the secular, veterans and new emigrants. He showed similarities but also differences between Europeanism and the Mediterranean culture, between the programmatic and pragmatic approach in the everyday policy of Israel. He also stressed the issue of the social structure of Israel and the Jewish diaspora, who also live in Poland.

The next paper in this session was presented by Prof. Oz Almog of the University in Haifa, who referred to the subject: *Multiculturalism in Israel*. In his lively presentation, he discussed the issues of stereotypical perception of the Israeli society, by people from outside, as a homogenous society, while the Israelis are a very heterogeneous social group. According to Prof. Almog, the Israelis are multi-cultural society with evident subcultural differences and varied lifestyles. Contrary to common beliefs, even the very subcultures fail to have a stable, firm character.
Naturally, some of them are conservative and reject changes, whereas other are more flexible and open. However, all of them, with no exceptions, are subject to transformations. Prof. Almog briefly described the largest subcultures of the contemporary Israel and discussed their transformation process.

The presentations were then followed by a discussion.

After a short coffee break, the third panel of the conference began. It was divided into four sessions based on the four books published in the project within the new series: *New Social Policy*. In the panel, the participants of the expert groups of the project *Socially Responsible University* presented results of their research. The moderator of the first session in the panel, entitled *Transformation of the Service Sector in the Polish Social Security System* was Prof. Józef Orczyk of the Poznań University of Economics.

In the introduction, Mirosław Grewiński, PhD Hab., of WSP TWP, presented the topic: *Multi-Sector Social Policy in Poland*, which contained the introduction to the assumptions of the expert groups and publications. In the context of transformations of the welfare state, the author proved the need for a new perception of social policy which is becoming more and more pluralistic and activist. According to the author, in the future, the economisation of social policy with its investing function is going to influence the necessity to develop social services which will become the main element of the new social policy.

Next, Ryszard Szarfenberg, PhD Hab., of the Institute of Social Policy, University of Warsaw, presented the subject: *Services in Social Policy*, in which he characterised the main theoretical and definitional concepts of social services and their importance for the development of social policy.

*Social Services in Long-Term Care System* was the subject discussed by Barbara Więckowska, PhD, of Warsaw School of Economics, and Elżbieta Szwakiewicz, PhD, of the *Blue Umbrella* Association, who emphasised the necessity to distinguish those services from the systems of healthcare and social assistance. At present, long-term services are subject to two incompatible systems, thus there is a need to create an independent homogenous system in long-term care.

The next paper pertained to social insurance as a quasi social service. As the authors – Joanna Plak, PhD, of WSP TWP and Joanna Owczarek, PhD, of Warsaw School of Economics, proved, social insurance is a specific service that depends on providing social security which is financed from public funds which have the form of compulsory contributions. Privatisation in the sphere of social insurance is hindered by considerable limitations, mainly due to the fact that the final warrantor of the solvency of the compulsory social security systems has always been the state’s budget. Enabling the private entities to provide social services financed
from public funds entails the necessity to regulate the market top-down, to estab-
lish an office of supervision and to introduce mechanisms that protect service
beneficiaries and guarantee financial security of the system.

The last two presentations considered the processes of privatisation and mar-
ketisation in healthcare and in the system of social assistance. First, Magdalena
Osak, PhD, in her paper entitled: *Transformations in Healthcare – towards Private
Participation* showed the actual situation of who the service provider in healthcare
is, concluding that the system has already been privatised and marketised to a con-
siderable degree. Then, Izabela Rybka, PhD, of the Academy of Special Education,
and Ewelina Wiszczun, PhD, of the University of Silesia, diagnosed the state of
service providers in social assistance, taking into account the new entities such as
social integration centres and clubs or social co-operatives. The presentation was
followed by a worthwhile discussion.

The second session within the third panel pertained to community work and
its connections with local social policy. The session was moderated by Prof. An-
drzej Rejzner of WSP TWP.

At the beginning, Bohdan Skrzypczak, PhD, of the Local Activity Support Cen-
tre CAL presented his paper on the meaning and role of social and community
work in local social policy, showing its connections with social pedagogy and the
theory of social policy. An important message of the presentation was the empha-
sis on the necessity to treat community work as social service for a broader com-
munity and to show barriers and perspectives of its development.

Next, on the basis of his many year experience in the field, Zbigniew Wejcman
of the Support Office for the Movement of Self-Help Initiatives BORIS presented
the subject: *Local Partnerships and Local Community Development*, emphasising
that inter-sector and inter-institutional co-operation may be highly useful for the
development of local communities and solving social problems jointly. The idea of
local partnerships is based on the concept of the development of local communities
by means of their various resources that are not always noticeable. The perfect
model of the development of such communities is the co-operation of different
entities – the authorities and public institutions, entrepreneurs, non-governmental
organisations and groups of inhabitants – for the benefit of their common place. In
Poland, partnerships form the space where the social capital, that is values such as
trust, bonds or solidarity can be recreated as they enable co-operation and co-ac-
tivity of various social actors.

The next three papers pertained to good practice within community work. Anna
Witkowska-Tomaszewska and Katarzyna Stanek of WSP TWP presented
some interesting solutions relating to community education and indicated the
increase in its importance for local development. Adam Nyckowski of the Association *Heart for Children* presented his organisation's experience in running socio-therapeutic care centres for children and youth at risk of social exclusion in Warsaw. The author stressed the numerous barriers and problems faced when implementing programmes for social integration and inclusion and the lack of system solutions, which hinder the activity of various non-governmental organisations in the field. At the end of the session, Łukasz Tomczyk of the University of Silesia in Katowice discussed the subject: *Free Time Animation for the Elderly on Example of Third Age Universities* in which he presented the phenomenon of activating older people in Poland in the context of lifelong learning.

The session was followed by a discussion and questions posed by participants. During the last day of the conference, the third panel presentations continued with its third session pertaining to social economy, and in the fourth one – to corporate social responsibility. The session on social economy, moderated by Mirosław Grewiński, PhD Hab., was opened by Marek Rymsha, PhD, of the Institute of Applied Social Sciences, University of Warsaw. He presented the paper on socio-occupational reintegration services in social economy. The paper stressed that social and occupational reintegration services in Europe are one of the most dynamically developing types of social services. In the literature on comparative social policy, such services are customarily referred to as activation services and are treated as the area of service providing activation which is located at the point where the activities of social services, employment services and the organisations of the so-called third system (non-profit organisations and social economy entities) are crossing. The conclusion was that Poland has not – as until now – developed a firm corpus of activation services.

The next presentation was by Arkadiusz Karwacki, PhD, of the Nicolaus Copernicus University in Toruń, who discussed the connection of activation policy and social economy. The paper contained the description of the basic pillars on which the activation concept is based. Among them, the following were emphasised: employment, integration and civic-mindedness. According to the author, activation policy is the aiming for popularised activity in which the state distributes the responsibility for social order among citizenship-oriented society. Citizen activity ought to consider the concern for those who are not able to fulfil the requirements of the modern market-based socio-economic life. The offer should include measures directed at prospective chance provision and not short-term care. All assistance activities should rely on inter-sector and inter-institutional cooperation, on goods production and services provision based on innovative instruments and methods relevant to the resources and deficits of individuals and groups.
Thus, social economy is the quintessence of activation policy – both due to the objectives and measures of activation policy, expressed in those initiatives, but also due to the fact that it is not possible to imagine successes of activation policy without effective activities of social economy entities.

Next, Maria Gagacka, PhD, of the Technical University of Radom, and Stanisław Kamiński, PhD, of the Wroclaw University of Economics, presented the subject: *The Importance of Non-Governmental Organisations in Social Policy*, in which they stressed the role that the third sector plays in the realisation of social services. According to the authors, institutional order of the contemporary social policy more and more frequently relies on the involvement of a wide range of entities, both the public and the non-public ones, which reflects the replacement of the term welfare state with welfare mix. The paper contained numerous arguments for the involvement of non-governmental organisations in the realisation of social objectives. The third sector entities most frequently play the role of social services providers; they also participate in developing regulations to define legal scope of social policy. Their importance to social policy is proved not only by social arguments, but also the economic ones.

The last paper was presented by Joanna Lizut of WSP TWP who presented the catalogue of social services provided by social economy entities, and attempted to evaluate their effectiveness and efficiency. In the conclusion, the author claimed that it is difficult to assess the quality of activation services without assessing them by means of objective indicators and standards. The session was closed with a worthwhile exchange of opinions.

The last session referred to corporate social responsibility as the element of promoting social policy. The session, moderated by Małgorzata Bonikowska, PhD, of the *Think Tank* journal, was opened by the paper by Prof. Adrian Henriques of Middlesex University. He discussed the relations between corporate social responsibility and balanced development, and presented the condition which the sector has to fulfil in order to contribute to the concept of balanced development. One of the most crucial aspects here is the measurement of the level of pressure exerted by companies. According to the thesis of the book co-edited by the author, entitled *The Triple Bottom Line – Does It All Add up?*, the measurement techniques and different attitudes to it are the basis for any success in using the private sector for the benefit of balanced development. However, in order for balanced development to influence the practice, it is also necessary to discuss broadly understood issues of the policies that are being realised.

The author of the next paper entitled: *Responsible Company as Stakeholder of Social Development* – Jacek Dymowski of Abadon Consulting noted that the intro-
duction of the concept of corporate citizenship into social responsibility has caused legal persons to become community citizens who are not only obliged to obey the law, but who are also expected to undertake activities that go beyond the simple abiding of law. According to Dymowski, in the light of research carried out in Poland, the philanthropy of companies is not perceived as credible. It is beneficial neither to the companies nor their circles. Unfortunately, both the companies and society appear to lose what is most valuable at the same time. Thus, it is worth coming back to perceiving CSR as it was perceived by P. Drucker or M. Porter and M. Kramer who re-defined the meaning of social involvement in the way that improves its business effectiveness. This change is beneficial for both business and its environment.

On the other hand, Marta Karwacka of the Nicolaus Copernicus University in Toruń, in her paper: Public-Private and Private-Social Partnerships stressed, among other things, that the dynamic development of corporate social responsibility highly facilitates the co-operation between companies and public administration entities, as well as between companies and entities of the non-governmental sector. Each of those parties possesses resources and competencies which, if properly managed and co-operating like partners, complement each other perfectly. Partnerships are a chance not only for companies following the philosophy of corporate social responsibility, but also for public administration entities and non-governmental organisations.

The next presentation referred to the issues of CSR and gender. Ewa Rutkowska, the presenter of this subject, pointed out that the issue of women is more and more evident in the activities of companies who consider this issue in their policies of recruitment and development, and organising flexible forms of work and employment which promote life-work balance. However, there are still many problems to address in this area in Poland, since the situation of women on the labour market and in many companies is still very difficult in the context of equal opportunities as compared to men.

The personalistic viewpoint in the concept of corporate social responsibility was presented by Sylwia Lewandowska-Akhvlediani in her paper entitled: Corporate Social Responsibility as Viewed by the Individual. The author emphasised the necessity to implement social responsibility inside business, and not only outside it so that the real value of a company be strengthened, primarily including the human potential of the company. According to the author, thanks to the voluntary obligations taken on by companies and institutions, which operate in such a way that enables them to fully respond to the needs of the individual, there are prospects for reducing expenditure on public healthcare, social assistance, on minimis-
ing social problems or on pension security system. The workplace, its relationships and behaviour experienced there, all have a considerable impact on the individual, their psychical well-being and social environment. A content employee, whose daily work environment is friendly and development stimulating, is a happy member of the society.

Anna Daria Nowicka, the author of the next paper: *Corporate Social Responsibility and Health*, presented examples of external projects realised by pharmaceutical concerns and companies from outside this sector. The author showed both good practice and examples of controversial activities. Particular attention was paid to ethical issues. Also, the author briefly discussed employers’ health promoting activities aimed at employees (those which result from legal provisions, and the voluntary ones which are elements of corporate social responsibility).

The last paper of this session, and the conference, considered innovations in corporate social responsibility. Its author – Natalia Ćwik pointed that in the face of increasing ecological barriers and against the background of social and economic transformations, companies operate in a more and more difficult environment where maintaining competitiveness requires reaching for new paradigms. One of the crucial sources of innovative solutions is the concept of balanced development realised at the micro-economic level by means of instruments of the corporate social responsibility area. The paper contained a synthetic presentation of types of influence of the said concept on the development directions of innovativeness, on example of selected companies in Poland. The session was followed by a discussion.

On behalf of His Magnificence, Prof. Julian Auleytner, Rector of WSP TWP, the conference was summarised and closed by Mirosław Grewiński, PhD Hab., who requested that the academy inform the organisers of any constructive criticism and feedback on the results and outcomes of the conference. He also thanked all persons involved in the project as regards its organisation and content.
First students of cultural studies in Poland started their education at the University of Wrocław forty years ago. The period of the last twenty years has been highly dynamic in terms of cultural studies as a field of study in Poland. The majority of Polish universities carry out research on culture and educate culture experts within numerous specialities. It is also possible to study the subject at the non-state institutions of higher education (Bachelor’s degree studies). Polish culture experts have been waiting for a possibility to summarize the achievements in this discipline and a popular field of study for many years.

The 1st Congress of the Polish Association of Cultural Studies that has existed since 2002 was held between October 15–17 2009 at the University of Silesia in Katowice and Cieszyn. Cultural Studies is a young academic field and therefore it is still shaping its identity and self-definition. The leading topic of the congress were the boundaries of culture. The main purpose was to discuss this issue and to present the cultural techniques for its scientific observation. “The notion of a boundary in culture contains its epistemological as well as ontological dimensions. Therefore, the questions regarding the boundaries of culture imply the necessity of determining phenomena in question, time and place of their occurrence and the cultural cognitive perspective, both the theoretical reflection and the practical application being taken into consideration”.

During the congress, the boundaries of cultural studies as a scientific discipline and a subject taught at universities and other institutions of higher educa-

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1 The footnotes refer to the program materials included in the documentation of the Congress.
tion were also discussed. The boundaries of research in the field of culture allow for cultural phenomena as well as the culture studies themselves. Such an approach shows the abundance of phenomena studied by culture studies. It is also characteristic of culture studies to present the multitude of disciplines involved in such studies, not to mention the diversity of scientific subjects and methods used. The congress of culture experts was a long-awaited science event for the Polish scholars. The congress was accompanied by the 3rd General Meeting of the Polish Association of Cultural Studies during which new authorities were chosen. Prof. Andrzej Radomski, PhD, was appointed the President of the General Board.

The Congress was organized by the Polish Association of Cultural Studies (Polskie Towarzystwo Kulturoznawcze), the Committee on Cultural Studies of the Polish Academy of Sciences (Komitet Nauk o Kulturze, Polska Akademia Nauk) and the Institute of Cultural Studies of the University of Silesia in Katowice (Instytut Antropologii Kulturowej, Uniwersytet Śląski w Katowicach). The congress was organized under the patronage of the Polish Ministry of Culture and National Heritage and was attended by representatives of virtually all culture circles in Poland.

The range and importance of the congress is documented by the conference part which contained 163 lectures within five conference panels: The Boundaries between Cultures and Civilizations – moderators: Prof. Stefan Bednarek, PhD, University of Warsaw and Izolda Topp-Wójtowicz, PhD, University of Warsaw; The Boundaries of Theory – moderators: Prof. Ewa Rewers, PhD, Adam Mickiewicz University in Poznań and Prof. Anna Zeidler-Janiszewska, PhD, Warsaw School of Social Sciences and Humanities; The Boundaries of Anthropology – moderator: Prof. Leszek Kolankiewicz, PhD, University of Warsaw; The Boundaries of the Media – moderators: Prof. Wiesław Godzic, PhD, Warsaw School of Social Sciences and Humanities and Prof. Andrzej Gwóźdź, PhD, University of Silesia; and finally The Boundaries of Art – moderators: Prof. Grzegorz Dziamski, PhD, Adam Mickiewicz University in Poznań and Maria Popczyk, PhD, University of Silesia.

The congress was officially opened by Prof. Andrzej Gwóźdź, PhD, the President of the Polish Association of Cultural Studies, at the Silesian Parliament in Katowice. He stressed the importance of the scholarly circles integration and discussion on the issues of modern culture as well as culture studies as such. In this part, Zina Jarmoszuk, PhD, the Director of the Department of State Patronage of the Ministry of Culture and National Heritage, read the letter by the Minister of Culture and National Heritage, Bogdan Zdrojewski. What followed was
the speech by Prof. Wiesław Banyś, PhD, the Rector of the University of Silesia, who emphasised the necessity of cooperation between the academic and scientific communities on shaping the cultural policy and funding.

The following part of the conference were papers presentations by various researchers. Prof. Banyś highlighted the underestimated contribution of the academic and scientific circles to shaping the strategy for culture development at the local level. An introductory lecture entitled A Few Basic Rules was delivered by Prof. Andrzej Mencwel, PhD, the honorary president of the Polish Association of Cultural Studies. In his paper, Prof. Mencwel pointed out the connections between theoretical and practical approaches towards culture. It was stated that “the Polish community of culture experts task is not only to carry out research into various aspects of culture, but it also participates in the creation of Polish modern culture as well as the European and global ones”.

The specificity of research into culture, involving attitude expression, responsibility, and participation in culture in different dimensions – social, public and political ones, were also stressed. Therefore, the mission of the Polish Association of Cultural Studies are not merely theoretical deliberations on culture, but also education and culture animation. In research on culture, the object and subject of such deliberations are identical, which makes it impossible to understand the culture phenomena fully, objectively and externally. Culture experts need to face such a challenge as “not only are they theoretical experts, but they are authors as well”.

The next lecture was delivered by a representative of foreign researchers, Prof. Ralf Konersmann, of the University of Kiel, the author of a book published in Poland under the title: Philosophy of Culture. During the lecture, Prof. Konersmann addressed the relations between culture studies and the philosophy of culture. The recognition of culture autonomy was suggested, which remains in opposition to the traditional way of treating it as the whole of phenomena which at the same time have different origins. According to Prof. Konersmann, this tendency has caused the marginalization of culture phenomena. It is an attitude present in the common way of describing the phenomena of contextualization. Also, Prof. Konersmann suggested the necessity to recognize the eighteenth-century German notion of pragnanz as the main category used to describe culture. Such a methodological approach favours the recognition of multiformity and independence of the notion of culture: “Culture is something belonging to itself. It is neither a base nor a superstructure, and undoubtedly is not a construct. The determination of its mode and, moreover, the availability of the phenomenal world of culture require readiness to perceive the pragnanz of the no-
tion of culture and the phenomena described by it as a challenge for the theory and the actual acceptance of this challenge”².

Other lectures delivered during this opening part were also of theoretical nature and mostly discussed the status of cultural studies. Prof. Zeidler-Janiszewska suggested that cultural studies should be considered “a trans-discipline” to stress its interdisciplinary nature. Prof. Andrzej Szahaj of the Nicolaus Copernicus University in Toruń pointed out that “Culture sciences have not only got the opportunity for self-identification, but their significance has changed as well – as opposed to the enlightenment paradigm giving the priority to the natural sciences, it is namely the cultural studies that should be regarded as the basic discipline due to the fact of the cultural nature of the human reality”. The causes for the emancipation of culture sciences were mentioned during many lectures. They are mainly the modern phenomena of globalization, multiculturalism, information society or cultural tourism. The relations of cultural studies and other disciplines – philosophy, linguistics, and social sciences were also thoroughly discussed.

Sessions and discussions in sections considered the extensiveness of research on culture. Numerous papers considered the role of the media in culture, the boundaries of the cinema, institutional theories of art, contemporary Polish dramatic works, photography, the Internet, interdisciplinary phenomena of modern art, multiculturalism of the Iberian Peninsula depicted in the Spanish cinema, modern architecture, Japanese art and Ukrainian art of publishing. Some of the papers dealt with the issue of cultural studies self-identification as separate research and academic disciplines. Other focused on describing the concepts of the modern researchers of culture: Baudrillard, Giddens, Žižek, and Latour.

The separate discussion panels dealt with the issues of multiculturalism of the Silesia region, the culture of the Polish Roma people, socially engaged art, stereotypes and ways of creating national identity, and boundaries of cultural intervention. The following issues were discussed as parts of the panel on the boundaries of culture: culture as a whole; ethnic, social, national, religious, time and space related differences; the issue of censorship; cultural identity; cultural regions; migration; nomadism; boundaries of cultural exploration; integration; particularism and universalism in culture; globalization; and

² The quotations come from the lecture by Prof. R. Konersmann, entitled: Cultural Studies and the Philosophy of Culture. Pragnanz of Culture – What Does It Actually Mean? translated by K. Krzemieniowa, included in the conference materials.
intercultural communication. The group dealing with the boundaries of civilization discussed the issues of culture and civilization; civilization transformations of culture and society; economic and political significance of culture differences; social justice and social exclusion; technology and cultural values; and cultural studies in view of the material aspect of civilization.

The output by the Anglican bishop and Irish philosopher George Berkeley reminds one of the famous statement by George Wilhelm Friedrich Hegel saying that philosophy is upside down world. Berkeley’s figure has attracted the attention of numerous commentators primarily due to his thesis of immaterialism: matter understood as the basis of phenomena and transformations in the world does not exist. The consequence which was supposed to result from this metaphysical stand – namely, solipsism that rejects the existence of real world – generated outrage and a series of polemics. In spite of the fact that in his works Berkeley explicitly and frequently admitted that there are numerous spirits-substances and nature, he has been labelled a philosopher who disregarded the common sense of his readers. The opinion by Kant who wrote about “the mystical and dreamy idealism”\(^1\) is a model one. The Anglican bishop was a victim of interpretational misconceptions ever since his philosophical works were published. However, it has to be noted that, as the time passed, Berkeley’s philosophy also met with a broad positive reception of people whose point of honour was to do it justice.

The circle of Berkeley’s readers who are free of prejudice includes Adam Grzeliński, the author of the book: *Człowiek i duch nieskończony: immaterializm George’a Berkeleya* [Man and Infinite Spirit: Immaterialism of George Berkeley]. In Grzeliński’s interpretation, the Anglican clergyman is – contrary to popular associations – a figure of the main stream in the British common sense philosophy, with such representatives as, among others, Thomas Reid and Dugald Stewart. As has been pointed out by the author, the common sense attitude is a way to address the world which assumes that objects are not only items of cognition, but meaningful elements of human experience. According to Grzeliński, such an attitude determined the entire output by Berkeley and urged him to question the concept of matter. Metaphysical and epistemological issues were important to the Anglican clergyman as long as they had a practical, moral and religious correlation.

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Since Berkeley was first a clergyman, and then a philosopher, historical research, which may reflect his intentions truthfully, ought to be carried out not in a problem-based manner but in a systematic one\(^2\). This is the approach chosen by the author of the publication reviewed. In the problem-based perspective, Berkeley’s philosophy is only a stage in the development of the more and more radical, sceptical tradition of the British empiricism, or Cartesian criticism whose peak achievement is the concept by David Hume and transcendental idealism by Kant. Such “radicalisation” would consist in a gradual abandonment of the metaphysics that relies on the category of substance for the philosophy of the subject. From this perspective, Berkeley’s doctrine appears to be an internally incoherent project, since contrary to the requirements of empiricism, it assumes the existence of spirits-substances. Still, as Grzeliński attempts to prove, Berkeley’s intention was the consensus of various stands: empiricism, metaphysics of religious provenance and mathematical natural history.

\(^2\) The problem-based, primarily focused on epistemology approach to Berkeley’s philosophy has been adopted by numerous authors. It is enough to mention here the famous criticism of idealism by Kazimierz Ajdukiewicz in his article Epistemologia i semiotyka [Epistemology and Semiotics] or the popular handbook by Jan Woleński Epistemologia: poznanie, prawda, wiedza, realizm [Epistemology: Cognition, Truth, Knowledge, Realism]. In specialised publications on Berkeley, this interpretation tendency is particularly visible in Jan Sarna’s Filozofia Georga Berkeleya: idealizm czy realizm [George Berkeley’s Philosophy: Idealism or Realism].

What are the rules according to which particular elements of philosophical system ought to be interlinked? The known commentators of Berkeley’s works – Arthur Aston Luce and Désirée Park – have concisely and accurately presented the common sense mode in which he poses issues: “God exists, thus can matter exist?”\(^3\) or “God exists, and given this fact, what else can we claim?”\(^4\) Grzeliński attempts to provide an answer to such questions. At the same time, he shows in a systematic order how Berkeley has built not yet an edifice of knowledge, but a cathedral – a complex of statements of religious significance, crucial as regards the salvation of the faithful. How this architectural undertaking can be completed, without embedding it in a firm base of matter, is presented to the readers by the author in seven chapters, beginning with the historical background of Berkeley’s philosophy.

As a young man, the Anglican clergyman was a careful and critical reader of Locke’s Essay Concerning Human Understanding, who in this work addresses the issue inherited from Cartesianism – the dualism of spiritual and bodily substance. Locke proposes to approach this issue in a methodological and psychological manner, that is to search the mind for such con-

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\(^3\) A.A. Luce, Berkeley’s Immaterialism, cited after: A. Grzeliński, Człowiek i Duch nieskończony: immaterializm Georga Berkeleya [Man and Infinite Spirit: Immaterialism of George Berkeley], Toruń 2010, p. 270

tent which has a reality of the object – it represents bodily substances. In Locke, the genetic direction of research is thus strictly dependent upon phenomenalistic investigations. However, Berkeley argues that the two philosophical programs cannot be reconciled: if the phenomenalistic analysis is employed, no cognitively “privileged” mental content can be distinguished – measurable primary qualities – nor a concept of independently existing matter be deduced from the content of experience. According to Grzeliński, Berkeley was inspired by the sceptical arguments from works by Nicolas Malebranche and Pierre Bayle. The former has proved that there is no rational basis to claim that any relation occurs between the thinking substance and the bodily one; the latter, though, questioned the Cartesian conviction that the God’s goodness justifies the existence of bodies and rejected the division into primary and secondary qualities. Facing those multiplying difficulties, Berkeley has solved the issue of dualism by removing one of its components – the bodily substance.

The above historical introduction, which describes the context of the emergence of immaterialism, is followed by Grzeliński’s presentation of particular components of Berkeley’s philosophy in a systematic order, beginning with the epistemological issues. The negative point of reference for theory-cognitive considerations is again Locke, in opposition to whom Berkeley proved that not all objects of our thinking may be reduced to sensory experience and simple ideas. That is why, besides ideas, Berkeley distinguished notions, that is necessary conditions for experience which are not sensory content themselves, such as spirit, God and relations. The very notions constitute the “first” object of thinking since what ideas are, and what their meanings are, is defined by relations of two kinds: relations to other ideas and reference to the subjects that perceive them. Berkeley no longer needs the category of matter as its regulative function is fulfilled by the notion of spirits equipped with will and imagination which purposefully organise their own experience. Thus, the objects of thinking are not representations of extra-sensory reality but the presentation of the creative activity of spirits.

This meaning of volitional activity of spiritual substances is the subject of the next chapter of the book. According to Grzeliński, the key to understanding it are Berkeley’s considerations on temporariness. Berkeley’s interest focuses mainly on time being lived which is a way for the subject to actively address the current experience on account of the events remembered and the expected ones. Volition which avoids unpleasant sensations and strives for pleasant impressions, relates itself towards the actual and the expected ideas, determining their meanings. As regards this relation of the subject’s activity to time, Berkeley describes spirit as substance that wants, imagines and remembers various objects. Next, Grzeliński presents Berkeley’s characteristics of the powers that are responsible for these activities and proves that not only perception but also volition is a positive condition for ideas.
to exist. Parallel to volition, imagination, or fancy, organises minima sensibilia (indivisible sensible points) in time and space relations – experience created in this way is called by Berkeley: conception.

If one investigates the relations of co-existence of objects of our thinking, one practices natural history which is the next subject of Grzeliński’s work. In the 17th century, corpuscular metaphysics was considered a doctrine which corresponds with and well justifies the findings of the fast developing natural sciences. However, Berkeley addresses the postulate by Isaac Newton hipotesis non fingo: theoretical models do not have to reflect the allegedly existing world of material bodies, and their statements will still be valid. This does not mean that the philosophy of nature ought to be eliminated. On the contrary, Berkeley considers it an autonomic domain and develops his immaterialist metaphysics in an unrestricted way. Mathematical natural history is assigned an instrumental task. Science is an instrument which serves people to learn what behaviour will enable them to satisfy their vital needs.

However, the pragmatic aspect does not exhaust the experience of nature. Nature plays also the role of intermediary of God’s will who dictates finite spirits their moral obligations – person undergoing an aesthetic experience recognises his/her own vocation. The fifth chapter is organised around the comparison of aesthetic concepts by Berkeley and those by Lord Shaftesbury. Contrary to Berkeley’s severe criticism of Shaftesbury, Grzeliński proves that their doctrines are fundamentally similar: both comprehend beauty and characterise aesthetic experience in the same way. Those two authors agree that the basic condition that enables perception of beauty is an impartial attitude of the subject that acquires. Nature in aesthetic experience appears as a harmonious whole which we are able to understand if we refer to the notion of the purposeful activity of Creator’s will. Natural beauty may be thus comprehended as a message which is addressed to us by the infinite Spirit. This message instructs that the human stop the constant chase after body pleasures and surrender to the good will of God. However, aesthetic experience can be identified neither with moral experience nor with the religious one. At this point, Berkeley departs from the position of Shaftesbury who did not distinguish between those three types of experience, and he develops aesthetics that is independent from ethics and philosophy of religion. Following Grzeliński, one ought to address, in the first place, practical philosophy.

Berkeley developed his moral and political doctrine in opposition to both the naturalistic tradition, whose representatives in Great Britain included, among others, Bernard de Mandeville, Hobbes or Locke, and the ethics by Shaftesbury. The former were criticised by him for reductionistic model of practical philosophy. Naturalists failed to notice the autonomic character of morality and politics – in these dimensions of activity, the objective of spirit are not personal, vital benefits, but the interest of the general public. Thus, morality and politics
cannot be absorbed by economy. It was well comprehended by Shaftesbury who, however, selected a too fragile basis for political order – aesthetic experience and a sense of bond with other people. Contrary to both positions, Berkeley argued that moral norms are unconditionally obligatory and are determined by, common to all finite spirits, rules of the reason. These rules, urging people to restrict their strive for particular goals, enable them to decide on their own intentions. The mankind’s destiny is “well-being of all people of all nations and all times, from the beginning of the world until its end”\(^5\). The realisation of this rule is guaranteed by the state to which citizens owe passive obedience.

The last issue addressed by Grzeliński is religious dimension of human life. Philosophical – theological discussions in Great Britain at the turn of the 17th and 18th centuries encountered certain difficulty which was a consequence of empiricism. Locke distinguished between the actual and the potential infinity: God is infinite in the former sense. According to Locke, though, in our experience, we fail to have any idea of actual infinity. Theologians used to solve this issue by supporting either the fideism or deism. Berkeley, as a clergyman, tried to avoid those positions and promote the Anglican revealed religion. Contrary to fideists, he indicated rational arguments, which were not, however, evidence, for the existence of God, and defending the positive revealed religion against deists, he emphasised that almost none of the aspects of human life can be rationalised.

Grzeliński consequently realises the research postulate “let’s read Berkeley”\(^6\) instead of analysing his text by means of unfamiliar categories. Reading Berkeley’s works in a systematic manner, the author avoids aporia which is typical of historians who focus solely on his inspirations with empiricism. Grzeliński does not repeat – like Jan Sarna in *Filozofia Georga Berkeleya: idealizm czy realizm?* [George Berkeley’s Philosophy: Idealism or Realism] – the mistake made by Roman Ingarden and Kazimierz Ajdukiewicz who imputed solipsism to Berkeley. While Sarna considered the metaphysics of the Anglican clergyman as a foreign body in his philosophy – an interjection that was supposed to save him from the religiously improper consequences of solipsism\(^7\) – Grzeliński convincingly shows that attempts to separate Berkeley’s epistemology from its ontological bases are completely unjustified. Content of experience (nature, world) – which the Irish philosopher stressed – are dependent on and shaped by volitional activities of spirits and their imagination.

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However, it is not the effort of the author who aims to fulfil the “systematic” interpretational directive, that is the biggest advantage of the book. This research postulate was already observed by Henryk Elzenberg in 1964, and realised by Stefan Sarnowski (Berkeley: zdrowy rozsądek idealizm [Berkeley: The Common Sense of Idealism]) and Stanisław Kijaczko (Immaterializm: epistemologia i metafizyka. Próba interpretacji filozofii George’a Berkeley’a [Immaterialism: Epistemology and Metaphysics. An Attempt of Interpreting George Berkeley’s Philosophy]). Compared to other Polish publication on the Irish philosopher, the originality of the work by Grzeliński depends on a different quality.

The importance of the publication is determined by a vast area which the author covers and the firmness in underlining the common sense nature of Berkeley’s philosophy. As regards the former issue, the scope of study in the Polish publications on the Anglican bishop used to be modest. The most developed section of his works was epistemology (to mention the detailed analyses by Przemysław Spryszak – the author of Filozofia percepcji George’a Berkeley’a [The Philosophy of Perception by George Berkeley]); also, the interest of Sarnowski and Kijaczko was metaphysics and ethics – however, it has to be noted that the analyses by the former author are quite casual. On the other hand, Grzeliński has also deduced from the immaterialist metaphysics the views on aesthetics, science (including the very detailed analysis of the works on optics), and religion; he writes a lot on the emotivistic function of language, and moral and political philosophy. The area the author covers is extremely vast, which does not hinder its coherent, systematic presentation – all fragments refer to immaterialist metaphysics. Analysing each section of Berkeley’s works, Grzeliński attempts to capture the specificity of the use of spiritual powers which causes that the same minima sensibilia are comprehended in different modalities, or aspects: the vital, aesthetic, moral and religious ones. It has to be noted here that the immaterialist metaphysics, as the binding point of the whole Berkeley’s philosophical system, has been presented by the author with pietism and ingeniousness. The asset of the monograph is even greater since Berkeley’s teaching on notions has always caused the commentators the most difficulty since the notions of spirit and relation cannot be reduced to empirical motives of his philosophy. It is also evident that Berkeley does not provide his readers with sufficient reasoning that resulted in his assumption of notions, nor presents any pos-

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9. This interpretational difficulty has been admitted, for example, by Anna Hochfeldowa. Cf. A. Hochfeldwa, Kryzys teologii naturalnej: George Berkeley [The Crisis of Natural Theology: George Berkeley], “Archiwum Historii Filozofii i Myśli Społecznej” [“Archive of the History of Philosophy and Social Thought”] 1971, Vol. 17, pp. 202–204.
itive content which underlies the notions of spirits and relations, addressing this crucial issue – as it is the case in Treatise concerning the Principles of Human Knowledge – in a rather superficial manner. However, Grzeliński sufficiently reconstructs the immaterialist metaphysics and also takes into account the context of justifying the concept on spirits activity, showing why, into his system, Berkeley introduced categories irreducible to ideas and what their role is in the theoretical reconstruction of human experience.

Additionally, the author bears in mind that the solutions to particular issues, based on immaterialism, are not merely Berkeley’s philosophical show – the Anglican clergyman strove for saving the common sense cognitive attitude, the message of which is that the world is what we perceive and that the world is meaningful to us. While other authors, for example Kijaczko, considered this dimension of Berkeley’s works a rhetorical trick which was supposed to protect him against criticism\(^\text{10}\), Grzeliński treats Berkeley’s beliefs seriously, which ought to be regarded another asset of the reviewed work. The basis for motivations which inspired Berkeley to philosophical attempts was the observation that people of the modern era experience a specific crisis of consciousness. A side effect of scientific-technological progress is the absolutisation of the pragmatic modality of approaching experience and the decline of the natural cognitive attitude. It is not true that the metaphor of nature as an independently functioning machine, or a clock, is imposed upon our common sense with great force – after all, nature can be considered in the same way as language. The choice of technical allegories is a sign that the cognitive position of the modern person has already been much reduced. Berkeley’s intention was to prove that this change of consciousness leads to poor moral, political and religious consequences. The attempts by Berkeley cannot be thus called a rhetorical device: the philosopher believed that he had not lost common sense, though, he was concerned if his contemporaries are also of sound mind. Thus, Grzeliński is right to note that the common sense cognitive attitude influenced all philosophical achievements of the Anglican bishop.

Nevertheless, one ought to pose a question: if the author has considered all consequences which result from such a position of Berkeley. If Berkeley is primarily a clergyman, and only then a philosopher, therefore, the systematic reading of his works should take into account the objectives he strives to achieve, even if nowadays we are not willing to admit that they are strictly philosophical. Although Grzeliński admits that Berkeley’s works are apologetical, little space and attention is paid to theological issues – the chapter on philosophy of religion is of a lower level compared to the other sections of the book. As it has been men-

tioned, the author mainly focuses on the dispute of the turn of the 17th and 18th centuries, the sources of which ought to be found in Locke’s considerations on infinity. However, this issue was not sufficient for the scope of challenges set by the philosophical concepts of that time, which had to be addressed by the apologist for the revealed religion; let us list even several difficulties. The consequence of the Cartesian dualism of the spiritual and the bodily substance was Locke’s and Malebranche’s sceptical assessment of human capabilities of learning about nature, and questioning the validity of, extremely popular then, physical-teleological evidence for the existence of God\textsuperscript{11}. The formation of, if not evidence, then even rational argument for God’s existence, ought to be perceived as one of the sources of Berkeley’s motivation to create new metaphysics and a new concept of nature. Another, quite obvious, and yet not omitted by the author, objective of Berkeley’s apologetic effort was to confront hedonistic and atheistic (or pantheistic) consequences which derived from the positions of Baruch de Spinoza, Hobbes or the reborn Epicureanism. Beside philosophical issues, also the theological ones influenced the overall system of Berkeley. Grzeliński observes only one of them – like Luce, he notes that the basis for the difference in Berkeley’s and Malebranche’s perception of matter is different comprehension of the dogma on Christ’s incarnation in the Communion by the Anglicans and Catholics – but he does not explore this issue in the last chapter. A mystery has still remained Berkeley’s critical attitude to Socinianism and the influence of the specific position of Anglicanism as the official religion on his philosophy of politics. None of these issues was addressed by Grzeliński. This shortcoming could be ignored by claiming that it refers only to one section of the book, however, in accordance with interpretational directives, which were defined by the author himself, Berkeley’s philosophy as a whole ought to be considered natural theology – let us admit that it is an extremely original theology which is a phenomenon in the history of ideas since he uses empiricism as his weapon. Therefore, it is hard to note that the conclusion, which, according to the author, was supposed to be the critical section that assesses the success of Berkeley’s theological-philosophical undertaking, is only three pages long and is limited to the citation of several remarks by Reid and Hume on the sceptical character of his position. To compare, the digression on the concept of ether is over twenty-page.

Although Grzeliński does not exploit the entire systematic and common sense potential of the interpretational key, this should not obscure the quality of his work. Since 2002 when the book by Kijaczko was published until Grzeliński’s monograph, no considerable single-thematic publication which would attempt to broaden the sys-

Adam Grzeliński: Author’s Note on the Review of Człowiek i duch nieskończony: immaterializm Georga’a Berkeleya [Man and Infinite Spirit: Immaterialism of George Berkeley]

I would like to thank the reviewer for many positive words that he used reviewing my book – such reviews would certainly make any author blush since no one else knows all the shortcomings of their work better than the author himself. I must agree with Reviewer that many issues raised in the book are worth a broader and more detailed analysis: obviously, not only the relations between Berkeley’s religious views expressed in his philosophy and the doctrine of the Anglican church, or with Socinianism, as it is suggested in the review; other issues could be added to this category as well, such as deism of John Toland and Matthew Tindal, Pierre Bayle’s skepticism, religious writings of William King and Peter Brown (clergymen and opponents of Berkeley) to name a few. As there are many topics worth a more detailed consideration, I believe they should remain such for future studies.

Nevertheless, there are some issues mentioned in the review I feel obliged to clarify. It is the fact that Berkeley’s works are a kind of religious apologetics, although they have widely recognized philosophical value and importance. Scholars dealing with Berkeley’s thought cite not only his primary texts, such as Treatise on the Principles of Human Knowledge, Dialogues between Hylas and Philonous, or Alciphron, but also refer, even if marginally, to essays published in the Guardian or to the sketches of his sermons. The religious tone of the thought should not be neglected. It is also worth mentioning that the bishop of Cloyne, as Berkeley is often referred to, had extensive knowledge and was deeply interested in sciences, or political and economical issues.

All these make any attempt of an overall presentation of Berkeley’s philosophy a question of choice and setting a perspective from which such an attempt should be made. In case of Man and the Infinite Spirit, it was (and such was my intention) a philosophical and systematic perspective. What I intended to achieve was to show the complexity of the philosophical system often abbreviated to the noun immaterialism or the famous phrase esse est percipi. Occasionally, it was necessary to treat some topics somewhat superficially; the theories of Th. Hobbes and of B. Mandeville were even only mentioned. But what about the relation between epistemology and metaphysics and religious beliefs, which were de-
ependent not only on the dogmatics of Anglicanism, but also on Berkeley’s own worldview, the relation on which any interpretation of Berkeley’s philosophy must be based? Berkeley reformulates many philosophical questions trying to bring religious faith nearer experimental empiricism of his time. If philosophy is meant to be a clear and precise expression of a worldview, it cannot ignore its metaphysical claims. Berkeley was perfectly aware that empiricism could have resulted in skepticism (also concerning religion) similar to that can be found in David Hume’s *Treatise on Human Nature* or *Dialogues concerning Natural Religion*, and abandoned this way of reasoning (only some remarks on it can be found in the relevant entries of his *Philosophical Commentaries*). On the other hand, presupposing the existence of matter, he links it with the approval for seeing the nature as a quasi-mechanistic being, indifferent to man with all his needs and goals. This denial of Providence, which was more and more clearly evident in the theses by many philosophers of Berkeley’s time, was the source of his immaterialism. The identification of any activity with creation, the claim of the primacy of tangible individual experience over any conceptualization, and a pure subjective character of temporality should also be treated as Berkeley’s way of reconciling philosophy with religion. All these, as I stated in the book, were the justification for Anglican dogma of symbolic presence of Christ’s body and blood in the mass and created a vision of the future life.

What is essential is that Berkeley emphasized the emotive character of the language; also his own works can be read twofold: as works containing philosophical (and also scientific) content, but at the same time, as a kind of religious apologetics or proleptic speech directed atheists and free-thinkers. That is the reason why the commentators find it quite difficult to divide them into two separate categories, one referring to religion, the other to philosophy; it seems that the reformulation of philosophy (or, in Berkeley’s own words, his “new way thinking”) was to point at the possibility of reading the very philosophical theses as arguments for the existence of God and as encouragement for worshippers. Interestingly enough, Berkeley does not formulate any “proof” in the metaphysical sense, but proclaims the necessity of relating all phenomena to man and his goals and what he recognizes as good: well-being of his worldly body, moral good or care for his soul – all these presuppose the providential order of the world.

This accounts for the fact that the last section of *Man and the Infinite Spirit* is so short – which reviewer considers its shortcoming: the main religious arguments, namely the order of nature as discovered in sciences, sublime natural beauty, and moral duties independent of capriciousness of human will, were pointed out in previous chapters. However, anyone who has once read Berkeley’s *Alciphron*, remembers that although Euphranor, the philosopher’s alter ego, could sometimes convince Alciphron, the atheists, or the title “minute philoso-
pher”, at the end of the seventh dialogue the latter leaves tired of the discussion and the whole religious debate is left rationally unresolved. Similarly, as far as faith is concerned, Berkeley claims there is no evidence. And although Berkeley’s arguments enabled one to find religious undertone in empiricism, there is one exception: the revealed religion. Quite on the contrary to what can be read in the review, the way Berkeley understood religion cannot be reduced to rational, natural religion of philosophers, to the religion which in his days took the form of deism and in the hands of Toland and Collins was deprived of its mysteries. Even if Berkeley had used certain arguments for acknowledging the revelation, the detailed analysis of his doctrine would seem to go beyond the scope of the work of philosophical character, and as far as I know the literature, it is hard to find relevant studies. Is seems that nowadays Berkeley is perceived more as a philosopher than a theologian.

The review contains one more critical remark concerning the structure of the book. I cannot agree with the statement that “the digression on ether” is comparatively too vast because it is twenty pages long. Ether, the alleged substance of fire, and of light, was the subject of serious scientific speculations at the beginning of the eighteenth century (for example Isaac Newton wrote on it in his early essays and letters, and in his last significant work, The Optics (1704), and in 1755 Immanuel Kant wrote on ether in his Meditationum quarundam de igne succincta delineation). Nevertheless, science was then abandoning its qualitative character and became fully quantitative thanks to discoveries by Newton in physics and later by Lavoisier in chemistry. As the activity of ether was rather a mere speculation, perhaps it was only in the aesthetics that the qualitative character of the experience was still recognized. The interpretation, I suggest in my publication, attempts to restore the integrity of Berkeley’s thought; according to it, the theory of ether should be seen as a conceptual equivalent of the aesthetic experience: ether, as light, creates all the objects of perceptions – the only objects that were real to the Irish philosopher. The concept is worth our attention not only because it gives us an insight into an interesting period of forming modern science as known today, and not only because it requires an interpretation by anyone who studies Berkeley’s works and who encounters the difficulties in coherent reading of his Siris, but also because it emphasises the link between the philosophy of nature and the aesthetics in George Berkeley’s philosophy.

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For the last thirty years neoconservatism has been one of the most important political currents contributing to the policy making of the United States of America, the only world superpower of today. It is no surprise then that the theme and the content of neoconservative ideas have been attracting both intellectual attention as well as emotional and somehow unbalanced reactions. General public does not tend to appreciate the word. Some say it is about hawkish imperialism of American foreign policy, others suggest an insider plot among American elites, some talk about a Jewish cabal. The year 2010 was particularly rich in monographs pertaining to the topic of neoconservatism. Within several months three important contributions appeared, each of them differing from the others. Here is a brief account.

The book by Thomson and Brook begins as an intellectual farewell of the first co-author to the milieu he used to frequent while being “once associated with the Straussian school of political philosophy” (p. IX). It is to be a “book to alert” his readers to the “threat” posed by neoconservatism (p. X), not a very much objective position to start from. The book is composed of five parts and ten chapters, but their content can easily be ranged into two issues: the ideas of neoconservatism and the ideas of Leo Strauss. What is the reason to include an academic philosopher passed away in 1973 to the account of political current which supposedly lived its greatest triumph during the Operation Iraqi Freedom in 2003? What is the link between a scholar abhorred by current political engagement and whose favorite entourage consisted of classical texts of Plato – with freelance brave new world architects and masters of current polemics retracting from too much theorizing? Well, after finishing the book, the reader still does not know, the link of dependency seeming so obvious for the authors that they do not even bother to explain it. Not for the outside world, though.

“The thesis on influencing neoconservatives by Strauss belongs rather to the world of fantasy, which conceived in unknown conditions starts living its own life and fakes the reality” – notes political philosopher Ryszard Legutko¹. In Thomson and Brook’s case the two themes go one along another so that they could be published separately: chapters 1, 2, 8 and 10 as a piece on neoconservatism, and chapters 3, 4, 5, 6, and 9 as

an account on the old Platonist. With a possible exception for chapter 7, entitled: The World According to the Neocons, where the writings of one of their representatives are interpreted in the light of Strauss’ philosophical categories, including their alleged “fascist temptation” (chapter 9 title). This is the strategy oddly similar to the one tried some years ago by Shadia Drury in her widely criticized (also by our two authors) work on Strauss and the American Right’s ideology. What is relatively novel here is the “obituary” thesis. However, there is nothing new indeed as the thesis appears in terms of an ironic rejoinder to the neoconservatives’ own thesis announcing an obituary for socialism in the past. Proclaimed in 1976, it did sound novel. But soon after, when the global communism collapsed in 1989 the American neoconservatives felt for a moment like writing down the obituary for their own movement. In these days it seemed there was nothing left to fight for and no-one to fight against. The terrorist attacks of 2001 on the World Trade Center and Pentagon could not have been possible to foresee at that moment. To the contrary, the Thompson and Brook’s 2010 obituary update does not sound convincing. Consider: one cannot warn against something he actually fears of enduring and write down its obituary at the same time.

The approach of Jesús Velasco is different. Instead of inventing things this Mexican-born scholar listens modestly and asks questions. He starts his own book by telling the story of an invitation he received for a party organized at the house of Seymour Martin Lipset, one of the greatest sociologists of our time and, besides, one of the most prominent neoconservatives. At Lipset’s party, a number of big neocon names were in, and the experience became a stimulus for the scholar’s serious involvement in the research. Then a number of academic stays took place: at George Mason (Lipset’s home university), at Harvard, at the Rockefeller Center in New York, and Woodrow Wilson Center in Washington, D.C. The result is a piece of “political science [made] with the instruments of history” (p. XVI). This means: respecting the sources, respecting the detail, avoiding quick generalizations, and enriching the data through personal interviews. Velasco’s perspective is an analytic one. He distinguishes among cultural, political, and economic issues, referring to the three realms of neoconservative activity: ideas, institutions, and interests, all of them in constant interaction. His basic goal is to clarify the difference between the first and the second generation of neoconservative thinkers. In doing so, he elicits the figures of first and second rank (called “core” and “periphery”) within each generation. He points out that the first generation of neoconservatives (Irving Kristol, Norman Podhoretz, Daniel

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Patrick Moynihan, Jeane Kirkpatrick, Michael Novak) has been more academically oriented, ideologically acute, and had had to pay the price of dramatic political and societal breakings. The second generation (Irving Kristol’s son William, Norman Podhoretz’s son John, Paul Wolfowitz – the highest placed neocon in the American government, Richard Perle, Robert Kagan) had a chance to be neoconservatives from the start, so their activity happens to be less speculative, more pragmatic and policy-oriented.

The title of Velasco’s book catches the reader’s attention by highlighting the names of two distinctive U.S. presidents, Ronald Reagan and George W. Bush. Arguably the biggest lacuna of the book consists of actually speaking not too much about them. Otherwise the author acts with scientific honesty and decency. He does not claim the two presidents were neoconservatives, which seems proven even if they chose to surround themselves with advisers representing this political current. He does not content himself with widely spread stereotype on neoconservative plot behind the military intervention in Iraq in 2003. Regarding the Leo Strauss controversy, he relates it on merely three pages so as to conclude that neoconservatives could have effectively considered the ideas of him as well as those of other academics, but even if it was the case, they “have transformed them to create their own foreign policy perspective” (p. 164). One of the last sentences of the book can be read as a rejoinder to Thomson and Brook’s “obituary” thesis: “Neoconservatives seem well equipped to navigate the turbulent waters of the years to come. […] it is unlikely that neoconservative institutions and networks will vanish in the near future” (p. 235).

Justin Vaïsse shares this conclusion, too⁴. He is another foreign scholar who decided to take a close look at the American neocon conundrum. His 2010 book is the traduction of French original published two years earlier at Odile Jacob in Paris, France. Like the other authors mentioned above Vaïsse acts as an insider, currently holding a position at Brookings Institution, renowned think tank situated at the heart of the U.S. capital. “Sometimes we need a non-American to see American politics in a proper perspective – acknowledges Francis Fukuyama, himself ex-neocon, at the dust jacket of Vaïsse’s book. – Vaïsse offers one of the most comprehensive and balanced studies of the history of neoconservatism yet to appear”. Words even more obligating (about offering the readers “everything they need to know” on neoconservatism) come from Zbigniew Brzezinski, pronounced opponent of neoconservative stance. This may only recollect the praise of an older monograph on neoconservatives by Gary Dorrien, coming from Russell Kirk, the leader of American traditional (or paleo-) conservatism, much unsympathetic to the neocon avant-garde⁵.

Justin Vaïsse’s idea for ordering his account on neoconservatives is to divide them into three “ages”. The first age denotes those of them who after abandoning far-left (yet anti-communist) positions held in their youth decide to reconcile in the 1960s with mainstream American values. It is the time when these very values are heavily contested by the student movement on campuses and the Vietnam War dissenters. On that occasion, the term of new conservatives or neoconservatives is coined by their critics. The second age comes in the 1970s as a mark of protest against consolidating the New Left positions within the Democratic Party (where the neocons still place their hopes) and disappointment with the Left in general. In the 1980s, the majority of the dissenters make a move towards Ronald Reagan into the Republican camp. The third age of neoconservatives comes in the 1990s as they take their chance of influencing the shaping of domestic and foreign policy in Washington.

The problem with this three-module typology is that instead of ideas it wants to range people. Hence, some difficulties as in the case of Michael Novak (born in 1933, now in his late seventies) who, according to Vaïsse, once “exemplifies the convergence of the first and second ages of neoconservatism” (p. 205) whereas in another place represents the second and third ages of it (table at p. 285). Another difficulty arises as the consequence of each and every categorizing (inevitable in scientific work). Vaïsse expresses his intellectual debt for one of his predecessors Gary Dorrien (p. 334). Yet while Dorrien’s book was explaining neoconservatism by presenting its four major figures, in Vaïsse’s account one of them is completely ignored. This absent figure, sociologist Peter Berger, altogether with Catholic theologian Richard John Neuhaus (himself also neglected in Vaïsse’s book), Michael Novak and some other thinkers can be regarded as an entirely different branch of neoconservative family. “Commentators typically overlook how powerful the religious note in neoconservatism is” – observed Michael Novak referring to the majority of his political allies, including neoconservative founders Irving Kristol and Norman Podhoretz. As for the religious factor, Vaïsse’s book reveals to be particularly tone-deaf, to recall the famous Max Weber’s expression.

These are, however, minor defaults which cannot alter the general impression that Justin Vaïsse’s monograph is an excellent work. Its principal merit is to highlight variety and diversity of neoconservative ideas as opposed to simplistic, reductionist accounts that can be found elsewhere. Reports on predominant influence of Leo Strauss on shaping neoconservative stance are summed up here as “fundamentally erroneous” (p. 271), as much as another widely spread suspicion – that neoconservatism would be a kind of Jewish conspiracy (p. 273). The young French author has

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proved his fluency in the subject and the talent for synthesis. The books of Vaïsse and Velasco will surely become indispensable tools for students of American neoconservatism. The talent for synthesis and intellectual honesty of the authors shall serve as a lesson of good scientific practice, especially when contrasted with cases where the lack of insight tends to be covered with disseminating fears and suspicions.

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