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## CONTENTS OF THE ISSUE

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- i. Copyright Notice
- ii. Editorial Board Members
- iii. Chief Author and Dean
- iv. Contents of the Issue
  
1. Framing France's Domestic Response to the November 2015 Paris Attacks – Insights from Al Jazeera English. *1-9*
2. Community Participation in Natural Resource Management in Madurai District-TN INDIA. *11-18*
3. Opportunities and Barriers of Exclusive Breastfeeding in South Western Oromia, Ethiopia. *17-27*
4. The Creation of Social Welfare Policies: Comparative Analysis between German and Brazilian Experiences. *29-40*
5. Life after Life: An Assessment of Elderly Institutional Care in Addis Ababa City (in Particular Reference to Makedonia Home for the Elderly and Mentally Disabled). *41-47*
6. Redefining Success: Role and Scope of Social Work. *49-54*
  
- v. Fellows
- vi. Auxiliary Memberships
- vii. Process of Submission of Research Paper
- viii. Preferred Author Guidelines
- ix. Index



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## Framing France's Domestic Response to the November 2015 Paris Attacks: Insights from Al Jazeera English

By Siyum Adugna Mamo

*Jimma University*

*Abstract-* This article examines Al Jazeera English's framing of the French authorities' domestic response to the November 2015 Paris attacks. The objective of the paper was to analyze the way Al Jazeera English framed the French government's domestic response to the attacks using qualitative textual analysis method of the selected news articles. The findings show Al Jazeera English's critical stance towards the domestic reaction of French authorities to the attacks. The network, voicing the opinions of French Muslim minority groups in its framing, contests the anti-terror operation and the state of emergency which occurred in the aftermath of the attacks. Its framing highlights a further marginalization and exclusion of French Muslim minorities who are already suffering from Islamophobia since the 9/11 attacks and after Charlie Hebdo attack. The article concludes that the network, in its framings, voices the views of the French Muslim minorities.

*Keywords:* AL jazeera, framing, french muslim minorities, parris attacks, terrorists.

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FRAMINGFRANCESDOMESTICRESPONSETOTHENOVEMBER2015PARISATTACKSINSIGHTSFROMALJAZEERAENGLISH

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# Framing France's Domestic Response to the November 2015 Paris Attacks: Insights from Al Jazeera English

Siyum Adugna Mamo

**Abstract-** This article examines Al Jazeera English's framing of the French authorities' domestic response to the November 2015 Paris attacks. The objective of the paper was to analyze the way Al Jazeera English framed the French government's domestic response to the attacks using qualitative textual analysis method of the selected news articles. The findings show Al Jazeera English's critical stance towards the domestic reaction of French authorities to the attacks. The network, voicing the opinions of French Muslim minority groups in its framing, contests the anti-terror operation and the state of emergency which occurred in the aftermath of the attacks. Its framing highlights a further marginalization and exclusion of French Muslim minorities who are already suffering from Islamophobia since the 9/11 attacks and after Charlie Hebdo attack. The article concludes that the network, in its framings, voices the views of the French Muslim minorities.

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## I. INTRODUCTION

Media has a significant influence on the workings of the everyday politics in the 21<sup>st</sup> century, as the media frames incidents in various ways depending on the national interest, geo-political settings, the influence of owners, their mission, and so on. The 9/11 attack in the United States (US) and the anti-terrorism operation that it brought changed the framing, categorization and focalization of news of incidents of media as interstate conflicts have declined while conflicts within states have risen (Dexter, 2008: 57; Kaldor, 2013: 80; Luckham, 2009: 5; Oberschall, 2010: 179). These conflicts within states are what Khaldor deemed as 'new wars' which include terrorism particularly homegrown terrorism (Kaldor, 2013: 80) – 'happening on [US and] Europe's doorstep' (Dexter, 2008: 57).

During the aftermath of 9/11, the Media started to demonize and marginalize the Arabs in general and Arab immigrants living in the West in particular. Moreover, the places where Muslims worship began to be considered as a place for the recruitment of extremists. As Cesari (2012: 439) writes, 'media coverage and anti-terrorist operations contribute to promoting the idea that mosques are places for radicalization and recruitment of future terrorists'.

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There exists a number of electronic and print media organizations that we can choose from based on our interests and criterion for validity. I took the process of writing this article as an opportunity to learn more about Al Jazeera English (AJE) and delve into its framing of the news of the French government's domestic reaction to the 13 November 2015 Paris attacks. I wondered how AJE – a media organization based in the Middle East and criticized by the West as 'a mouthpiece or a vehicle through which opponents of the West get their views across' (Zayani, 2005: 22) – framed the French government's domestic response to the 13 November 2015 attacks in Paris. The article examines the way AJE framed the French government's domestic response to the attacks. To this end, three website news articles which were published within 52 days after the attack are purposefully chosen as data to examine the way AJE framed France's domestic response to the attack. The three articles are qualitatively analysed using the qualitative textual analysis method.

Although categorization, framing and focalization are the analytical tools used in this article, I prefer to focus on framing, since 'applying frames to a crisis situation, such as a terrorist attack, may serve as a strategy with which to identify main causes and responsible agents, make moral judgments, and, finally, to suggest policy responses to the event' (Papacharissi and Oliveira, 2008: 54). With framing being the focus of the analysis, this article therefore explores the way AJE framed the French government's internal response to the 13 November 2015 Paris attacks. The objective of the article is to study the way AJE framed the French government's domestic response to the attacks by unpacking the way AJE framed France's domestic reaction. Though France swiftly responded to the attacks both internally and externally, the scope of this article is delimited to the internal reaction of French authorities. I start from the hypothesis that AJE's framing of the news of incidents which happened on 13 November 2015 in Paris is not only critical of France's measures, but that the network voices the views of Muslim minorities in France, since it is a 'pan-Arab' media outlet (British Broadcasting Corporation [BBC], 2015; Hammond, 2004: 2).

Aiming to provide an overview of the background of AJE and the socio-political context within which the attack happened, the article provides a

glimpse of the media and socio-political context of the incident before jumping to the November 2015 attacks in Paris.

## II. MEDIA CONTEXT

Being accessible across most of the globe, AJE is a news and discussion channel stationed in the Middle East. It is, according to Zayani (2005: 1), is a '24-hour satellite news and discussion channel beamed out of the tiny Gulf peninsula of Qatar' – a country 'once one of the poorest Gulf states, is one of the richest countries in the region today' from the income it gets from its huge stockpile of gas reserves (BBC, 2015). As Eliades (2016: 8) states, 'between 40 and 50 million Arabs watch Al Jazeera, taking into account 3 million in Europe and a few hundred thousand in the US. They go on to add that in times of crisis this figure doubles'. However, there are viewers from African, Asian, and Latin American countries, who are not included in this figure, since there is free online access to the network. The network reaches a truly global audience, since anyone who wishes to access the network may do so, and it covers news topics in every corner of the world. This fits into the network's claim to reach 'more than 270 million households in over 140 countries across the globe' (Al Jazeera, n.d.).

The Qatari government, headed by Emir Tamim bin Khalifa al-Thani, provides the sponsorship of the channel (Eliades, 2016: 12). The Emir has silenced the channel from embarking on any criticism against his government and has used the channel to control the Qatari people and silence opposition against his monopoly. The network 'serves as a propaganda tool, an extension of state power and a mouthpiece for state policies, and control of such an apparatus ensures that dissident voices do not have access to the public' (Zayani, 2005: 14). Moreover, while the Emir, who came to power in 1995 in a bloodless coup (Carney, 2016: 3; Eliades, 2016: 3), starts to bring liberal elements into Qatar, this channel has significantly helped him to influence the nation. According to Zayani (2005: 11), it 'is a showpiece of the Emir of Qatar and a symbol of his resolve to modernize his country'.

Although the network criticizes governments in the Gulf region, it is not bold enough as such to criticize the Qatari government (Eliades, 2016: 13) for the media 'are never completely independent from prevailing notions of what is in the national interest' (Dimitrova and Strömbäck, 2008: 203). It discusses issues that are very sensitive and considered 'untouchable' (Eliades, 2016: 7) and 'taboo subjects' (Carney, 2016: 1) for public discussion in the region. It, according to Zayani (2005: 2), 'enjoys an unprecedented margin of freedom which makes it a heaven for free speech in the Arab world. It is popular precisely because it openly discusses sensitive topics and tackles controversial issues'. This puts Qatar's relations with its neighbors in a critical condition

(Eliades, 2016: 9-11) since some states in the region 'have denied Al Jazeera permission to open a bureau or closed its bureaus temporarily. While some Arab states have rebuked the network, others have banned its reporters or refused them visas' (Zayani, 2005: 3). Despite this, it is believed to play a significant role for the transformation and rise of Qatar (BBC, 2015; Hammond, 2004: 2).

Al Jazeera, which is an Arabic word translated as 'The Peninsula' – referring particularly to the Arabian Peninsula – promotes equality, rights, and justice for those who are oppressed, marginalized and excluded in general and for the Arab world in particular. It is a 'Pan-Arab' channel (BBC, 2015; Hammond, 2004: 2) which is critical of the Western 'misrepresentation and misinterpretation' of the Orient (Said, 2004: 869). The channel 'has come to play an important role in broadening Pan-Arab interaction' (Zayani, 2005: 7). It is within this media context that AJE presents its news.

## III. SOCIO-POLITICAL CONTEXT OF THE INCIDENT

### a) *The post 9/11 measures and the depiction of Islam in the Western Media*

After the 9/11 attacks on the United States, European states, intending to securitize their republics and citizens, took bold measures. Among others, there is increased surveillance on Muslims living in the West; European states imposed restrictions on migration; states promulgated new laws which gave authorities the to monitor moderate Muslims making life very difficult for them and compromising their human and democratic rights (Cesari, 2012: 430-432; Edmunds, 2011: 73 and 76). Specifically, in France, as Cesari (2012: 431), writes, 'the 2001 Law on Everyday Security expanded police powers by permitting officials to stop vehicles, search unoccupied premises, and monitor or record electronic transactions without notice as part of anti-terrorism investigations'.

European states procured such sweeping powers in the name of securitization – 'exceptional measures and procedures outside the rule of law, justified by emergency situations that threaten the survival of political community' (Cesari, 2012: 432-433) – seemingly on behalf of the citizens of their countries. However, this securitization is often criticized for marginalizing and excluding Muslim minorities living in the West equating them with terrorists. Particularly, the Western Media began to associate terrorism with members of the minority religion. Following the 9/11 attacks, Abdulla (2007: 1063) wrote, 'Islam and Muslims started to come to the forefront of the Western media, albeit not for very positive reasons'. Furthermore, Edmunds (2011: 67) states that 'a new form of governmentality identifies signs of religious belief, such as the hijab, as a potential threat to national identity and

security'. This marked the time that Huntington's dictum 'Islam has bloody borders' – the thesis behind the war on terror after the 9/11 attack – got momentum in the West (Huntington in O'Gorman, 2011: 27; Luckham, 2009: 5). Since the 9/11 attacks 'were partially planned in Hamburg, and there were at least twenty Europeans among the individuals imprisoned by the United States in Guantanamo Bay', according to Cesari (2012), 'European Muslims are often viewed as 'foreign enemies', a classification that implies a much lower level of legal and social rights and privileges'.

Besides the further marginalization and exclusion of moderate Muslims that has been occurring in the West since 9/11, there has been a growing anti-Islamic sentiment across the globe. For instance, 'several mosques in Europe and Australia were petrol-bombed by individuals who believed they were 'doing the U.S. a favour'' (Abdulla, 2007: 1066). In France, they were considered as 'strangers within' (Walklate and Mythen, 2016: 341) and they 'have been 'cast out' of the political community in the period following 9/11'(Edmunds, 2011: 76). Furthermore, Edmunds (2011: 75) writes that 'they [Muslims] have become the current 'other' in public discourses'. Though extremist elements exist in other religions, for example in Myanmar where extremist Buddhists are involved in massacring Muslim Rohingya, this is largely absent from Western discourses and Western Media. Cognizant of this, June Edmunds (2011: 74) succinctly wrote, 'Islam alone is judged, in the media, to be fundamentalist, and other religions, which also contain fundamentalist strands, are absent from discussions of religious radicalization'. This leads the media to disseminate a distorted and imbalanced view on the Muslim religion and its followers. Such distortion and imbalances that equate the religious institution with terrorist organizations results in a backlash towards the West and increases the anti-US and anti-Europe sentiment among Muslims in the Middle East and across the globe, 'since Arabs felt that the U.S. insisted on dealing with Islam as an enemy' (Abdulla, 2007: 1078). As Abdulla (2007: 1079) notes, 'Arabs feel that the U.S. media are unduly focused on Islam as a breeding ground of violence and terrorism and that the media refuse to pay attention to moderate voices'.

#### *b) Islamophobia in the West – equating Muslims with terrorists*

The already distorted and imbalanced image of Islam in the west before 9/11, as Abdulla (2007: 1065) puts it, 'took a turn for the worse after the criminal attacks' on the World Trade Centre in US. The attack resulted in further marginalization and exclusion of moderate Muslims in the West. This has arisen from the wrong understanding or perception that Muslims are equated with terrorists even though 'all Arab countries condemned the attacks, for the most part, voices

communicated through the mass media still failed to differentiate between Arabs and Muslims, on one hand, and terrorists, on the other' (Abdulla, 2007: 1065). The media's actions contributed to the spread of Islamophobia in the West. Considering Christensen's claim on the distorted and imbalanced image of Islam in the West, as Abdulla (2007: 1064) states, the reason why the marginalization and exclusion of Islam increased in the West is because of the "distorted and imbalanced media coverage. . . Western news stories', he says, 'tend to show a mosque, a minaret, or a veiled woman regardless of the nature of the story, even when the story is about terrorism'. However, this doesn't mean that all media outlets are responsible for the demonization of Islam in the West by associating it with terrorism. There is media coverage which frames incidents in a fair way giving balanced views without bias. For instance, Le Monde, according to Abdulla (2007: 1067),

focused its analysis on the importance of understanding the other and acquainting oneself with foreign civilizations. It stressed that the issue is not one of a clash of civilizations, but rather a clash between extremists and moderates within each civilization and across ethnicities and religions worldwide. In this light, the newspaper argued, France should support the U.S. not in a war against Islam but in a war against the terrorists who carried out these attacks on humanity.

As it is noted from the above text, Le Monde has tried to distinguish Islam from terrorism. It calls for the support of France to stand in solidarity with US to fight terrorism not Islam. There is a clear and distinct view of Islam and terrorism in Le Monde's framing.

During the post 9/11 period, the frequency of contact between young Muslim immigrants and French police increased because of police's claim that they are required to check the identities of immigrants so that they can secure the citizens and the republic. This develops a sense of mistrust between the police and young Muslim immigrants (Walklate and Mythen, 2016: 334). Moreover, during identity checks by the police, harassment and biases were reported (Walklate and Mythen, 2016: 340). As Walklate and Mythen (2016: 342) note, immigration is viewed as one of France's social problems in 2014 besides its levels of unemployment and its economic situation. Particularly, non-Christian immigrants are perceived as a threat. Such a perception, they argue, puts 'the socially excluded in France, minority Muslim communities susceptible to extremism' (Walklate and Mythen 2016: 342).

Doha and Paris have a harmonious relationship despite Al Jazeera's critical standpoint towards France. 'Qatar', Hammond (2004: 10) writes, 'developed close links with France' particularly during the reign of

President Nicolas Sarkozy – ‘which paid off with co-operation over Libya and Syria and Qatari investment in the Paris property market’. It was in such socio-political context that the November 2015 attacks happened in Paris.

#### IV. THE 13 NOVEMBER 2015 PARIS ATTACKS – A QUICK GLANCE

Paris was calm on the evening of Friday the 13th of November 2015 until eight individuals, grouped into three teams, attacked six locations resulting in devastating casualties. This attack was the fifth terrorist incident in Paris in 2015 alone (International Institute for Counter-Terrorism [IICT], 2015: 3; Yeo, 2015). The 13 November 2015 simultaneous attacks, which took the lives of more than 130 people and left 350 injured (Belkin, 2015; Walklate and Mythen, 2016: 334; Yeo, 2015), shocked not only France – a liberal state that banned the Muslim face covering (Cesari, 2012: 444) and participated in the US-led war against terrorism in the Middle East – but also other Western countries.

France is one of the 60 countries attacking the Islamic State of Iraq and the Levant (ISIL) in Iraq (Belkin, 2015; McInnis, 2016: 1). This participation in the war against terror and the ‘marginalization’ of the Muslim minorities in France was taken as a reason for the attacks. According to Walklate and Mythen (2016: 341), it is also important to refer back and link the attack with ‘the military conflict engagement—then disengagement—of the West [– which France was a part –] in Iraq and Afghanistan has fuelled anger’.

The attacks, for which ISIL ‘has claimed responsibility’ and tried to instigate fear across Europe for more attacks on what it calls the ‘crusaders’ (Belkin, 2015; IICT, 2015: 3-6; Yeo, 2015; The Meir Amit Intelligence and Terrorism Information Center [MAITIC], 2015: 1 and 12), were the ‘worst’ and ‘deadliest’ one in Europe that ISIL has ever committed (Belkin, 2015; MAITIC, 2015: 1; IICT, 2015: 2; Yeo, 2015). According to the MAITIC (2015: 2-3) and the IICT (2015: 2), three teams that involved eight attackers committed the attack separately in six different places. The first team, consisting of three attackers, attacked the Bataclan Theatre after they managed to get in and opened fire which killed 89 people. The second team, which involved three suicide bombers, occurred at Stade de France – where there was a soccer match occurring between France and Germany to which French President Francois Hollande was in attendance. The third team, which involved two perpetrators, occurred at ‘the center of Paris where they carried out three shooting and a suicide bombing attack’ (MAITIC, 2015: 2-3). These separate, simultaneous and coordinated attacks killed 130 and wounded 350 civilians (Belkin, 2015; IICT, 2015: 2; MAITIC, 2015: 2-3; Walklate and Mythen, 2016: 334; Yeo, 2015). The attackers had a link with the

Jihadists in Belgium and Syria. While it was ‘planned, directed and supported by ISIS in Syria’ (MAITIC, 2015: 4, IICT, 2015: 3), it got a ‘logistic backup’ from members of the cell of this attack in Belgium, particularly in Molenbeek (MAITIC, 2015: 4, Belkin, 2015; IICT, 2015: 3).

The French Government swiftly responded to the attack both internally and externally. While it intensified its attack on ISIL in Syria and Iraq externally, the internal response, on which this paper focuses, began by trying to secure Paris and its residents from further attacks. This reaction included requesting the residents of Paris (and French citizens across the country) to stay inside their homes, closing its borders, universities, and some public transportation systems like the tram, train, and government offices through the state of emergency it declared in the aftermath of the attacks (IICT, 2015: 5-6). Soldiers also continued hunting the perpetrators who had escaped and raided homes of Muslim residents that they thought had links with the perpetrators. The soldiers and the police conducted ‘a wave of detentions, apprehending 23 individuals suspected of terrorism and placing 104 under house arrest’ (Belkin, 2015; MAITIC, 2015: 4-5).

#### V. MATERIALS AND METHODS

The existence of different ways of presenting incidents via the news media leads to the existence of multiple categorizations, framing and focalizations peculiar to the relative media pertinent to reality. As Meijer (1993: 368) rightly points out, ‘the ‘real’ world is constantly being transmitted and created through textual and visual discourses’. Hence, textual representation and reality are two sides of the same coin, as the two ‘cannot be divided into two separate realms’ (Meijer, 1993: 368). Though analytical tools such as categorization, framing and focalization, which I have used in this article, are relevant to unpack the way Al Jazeera framed the effects of the French government’s domestic reaction to the 13 November 2015 attacks in Paris, an emphasis is given to the framing of the incident.

Framing is formulating an account of a real event in a way that specific media intends the event to be conceived by audiences. It is understood as ‘the way events and issues are organized and made sense of’ (Reese in Dimitrova and Strömbäck, 2008: 204-205). In relation to this fact, Papacharissi and Oliveira (2008: 54) also claim that ‘frames guide the conceptual union of words and images and thoughts upon which individuals rely to make sense of their surrounding environments’. Specifically, it is ‘to select some aspects of a perceived reality and make them more salient in a communicating text in such a way as to promote a particular problem definition, causal interpretation, moral evaluation, and/or treatment recommendation’ (Entman in Papacharissi

and Oliveira, 2008: 53). Al Jazeera's framing of the news is influenced by the national and regional politics, religion, culture etc. within which it is situated, since framing of the news 'is influenced by the national [and regional] political context' (Dimitrova and Strömbäck, 2008: 205).

Considering Iyengar's account that 'most news coverage adopts episodic or thematic frames' according to Papacharissi and Oliveira (2008: 58), this article looks into whether thematic frames or episodic frames dominate Al Jazeera's framing of the news. While episodic frames focus 'on describing single events or occurrences and tended to involve the use of negative stereotypes', thematic frames present 'more in-depth coverage that emphasized context and continuity and detracted from negative stereotyping' (Papacharissi and Oliveira, 2008: 58).

Though this article focuses on examining the way Al Jazeera framed France's domestic reaction to the attacks, it will also address the channel's categorization and focalization of the event. Categorization is classifying actors based on some kind of characteristics that one deems the members or the actors share in common. At this juncture, it is important to bring forth the membership categorization approach (MCA) that Leudar and her colleagues describe. MCA, according to them, 'stresses situated aspects of categorizing, and focuses on how it is done in talk in activities' (Leudar et al. 2004: 244). On the other hand, focalization is about 'the perspective from which the story is told' (Meijer, 1993: 375).

A qualitative textual analysis is the methodology used in this article to examine Al Jazeera's framing of the domestic response for the incident in question using three news articles. Since AJE's satellite broadcast has an online stream and the online stream includes and uses textual news articles in its online live coverages, the three news articles are chosen from AJE's website. The news articles are chosen for their focus on the effect of France's reaction to the attack within the country to answer the question 'How does Al Jazeera frame the French Government's domestic reaction to the 13 November 2015 Paris attacks in its news?' The first article, which was published on 14 November 2015, is entitled 'Fear and confusion in Paris after deadly attacks'. The second article is entitled 'Activists decry mosque closures in France'. It was published on 3 December 2015 – 21 days after the incident. The third article is named 'From Charlie Hebdo attacks to a state of emergency' and was published on 6 January 2016. This article was chosen for its comprehensive and retrospective coverage of the Charlie Hebdo attack which happened on 7 January 2015 – few days before the November attacks. Considering that the four images in these three news articles require independent visual analysis, it is preferred to focus only on the textual analysis of the texts in the selected news articles.

## VI. RESULTS AND DISCUSSIONS

The results and discussions are lumped together and presented based on the analytical tools – *categorization, framing and focalization* – employed in the study. Yet, an emphasis is given to *framing*.

### a) *Categorization – France, French Muslim minorities and ISIL*

The first article (see Appendix-I) clearly indicates the 'us' and 'them' categorization. These two categories in this article are France and 'ISIL'. While the article delineates ISIL as 'bad guys' providing attributes like 'attackers', 'killers' and 'terrorists', it depicts France and its citizens as 'good guys' who suffered from the attack. The 'us' category includes French authorities in different departments. The 'victims' – 'the 128 killed', the '200 people' who 'were injured' are also in the 'us' category. Furthermore, the 'us' category includes the US, Britain, and Germany who condemn the attacks and express their support to France in the wake of the attack. Three categories are visible in the second article (see appendix-II). These three categories include: French Muslim minorities, French authorities and ISIL. The third article (see Appendix-III), which provides a critical and comprehensive analysis of the attacks, also creates three categories: France, ISIL and Muslim minorities in France. Generally, though there are clear and broader categories of 'us' and 'them' in the three articles, French Muslim minorities, the French authorities and ISIL are the three dominant categories in the three articles. These categories, which AJE uses to distinguish Muslim's from the perpetrators, are dominant and consistent across the three news articles.

### b) *Framing*

Though the first news article mentions that France reacted swiftly 'to ensure that no new attack can take place', the framing of the article somehow links to the lack of attention and concern for the same incidents happening daily in the Middle East and in sub-Saharan Africa. As the following quote from the first news article indicates,

Speaking to Al Jazeera from Pennsylvania, Malcolm Nance, a security and intelligence consultant, said it was likely that either ISIL or al-Qaeda was behind the attacks. "We shouldn't lose sight of the fact that this is actually an occurrence almost every day throughout the Middle East and sub-Saharan Africa. We just had an attack in Beirut which killed almost 40 people; we had a bombing of a Russian airliner over Egypt," he said.

Referring to the Middle East and sub-Saharan Africa through Malcolm Nance, who is an authority (professional) whom the network chose to justify its frame, Al Jazeera framed the incident in a way that suggests that the West considers the lives of its citizens

to be worth more than the lives of those in the Middle East. It shows that this kind of incident is what is experienced in countries in those regions on an everyday basis. Yet there was no international condemnation for these attacks and little cooperation with the countries in these regions. However, this news article, under its sub-heading 'international condemnation', shows that there is international condemnation for the attacks in Paris. The network, in the news article, states,

US President Barack Obama called the attacks in Paris "outrageous" and said the US was united with France. "Once again, we've seen an outrageous attempt to terrorize innocent civilians," Obama told reporters at the White House. "We stand prepared and ready to provide whatever assistance that the government and the people of France need," he said, and pledged to "bring these terrorists to justice and go after any terrorist networks" involved. "Those who think that they can terrorize the people of France or the values that they stand for are wrong," Obama said. British Prime Minister David Cameron said he was "shocked" by the events in Paris. "Our thoughts and prayers are with the French people. We will do whatever we can to help," he wrote on Twitter. German Chancellor Angela Merkel said she was "profoundly shocked" by the attacks.

As it is indicted in the above quotation, influential world leaders of countries of the West such as the US President Barack Obama, British ex-Prime Minister David Cameron and German Chancellor Angela Merkel – who denounced the attack and confirmed their solidarity with Paris – were cited to show the international condemnation for the Paris attacks.

The first news article further reports "[t]hese mass-casualty attacks are hallmarks of al-Qaeda and the ISIL organization. It appears now that the battlefield has moved from the Middle East and is now at the forefront of the Atlantic Ocean". This not only makes al-Qaeda and ISIL responsible for the attacks, but it also warns French authorities that the battle is at the forefront of French soil fitting Dexter's (2008: 57) view that terrorism is at 'Europe's doorstep'.

Citing rights groups and activists, including the Collective Against Islamophobia organization, the second article frames France's measure of closing mosques using the emergency rule as unable to guarantee peace and security and in violation of religious rights and freedoms of French Muslim minorities. From its inception, the title of the article – Activists decry mosque closures in France – indicates a discontent and condemnation of the measure of closing mosques. Particularly, the usage of the word 'decry' in the title of the article indicates strong disapproval of the French authorities' move to close mosques. The network

deliberately used this word in the title to indicate the pressure under which Muslim minorities are suffering.

The following text from this news article reads, Closing mosques in France that authorities say foster extremism will not prevent people from becoming 'radicalised' and could heighten a sense of alienation among the Muslim minority, rights groups and activists have said. At least three mosques have already been closed under France's extended emergency rule, which allows authorities to shut down places of worship that show a "pattern of radicalisation". A French Imam, meanwhile, said that between 100 and 160 more mosques are likely to be closed as part of the security campaign.

This not only shows closing mosques is inappropriate but it also warns that the measure will further increase the problem creating 'alienation' and marginalization of minority groups. The network, mentioning that French authorities are prepared to close 'between 100 and 160' mosques after they have already closed 'three', also shows the further marginalization and exclusion of Muslim minorities. The closing of such number of mosques, as the network highlights, implies the way that French authorities perceive their Muslim Minorities – equating the minority group with terrorists. In this frame, Al Jazeera not only tries to counter the narrative that mosques are places of radicalization and extremism (Edmunds, 2011: 75; Cesari, 2012: 439) but also aims to show that '[western] media coverage and anti-terrorist operations contribute to promoting the idea that mosques are places for radicalization and recruitment of future terrorists' (Cesari, 2012: 439).

AJE, being critical of France's identification of mosques with radicalization in its news, shows that French Muslim minorities became the 'target of 'retaliatory' violence' during the state of emergency. As it is stated in the second news article,

"Experts have proven that terrorists do not come from organized communities," Samia Hathroubi, a French-Tunisian human rights activist, told Al Jazeera. She added that there was a disconnect between what French President Francois Hollande says to reassure Muslims that they are not being "singled out", and the reality of raids under emergency law which have "largely targeted mosques and activists from Muslim communities". "I feel we should be very cautious in France with civil rights and our freedoms which are jeopardized by the state of emergency."

As the above quote indicates, French Muslim minorities are 'singled out', their 'civil rights' are violated and their 'freedoms' are 'jeopardized', and are facing the 'denial of religious freedom'. The article indicates how mosques are a peaceful place of worship and prayer but French authorities are unable to see such differences. Quoting Yasser Louati, from the Collective

Against Islamophobia group, AJE writes, 'If you listen to anti-terror judges, they will tell you that radicalization takes place outside of mosques. It happens in jails or clandestine circles or via the internet'. At this point, Al Jazeera, in a very subtle way, indicates the place where extremism originates which the network claims to indicate the failure of French authorities to view mosques as a peaceful place of worship and prayer that is different from 'jails or clandestine [circles]' – where radicalization occurs, or, according to the network, mostly 'via the internet'. Furthermore, the network, with the phrase 'we were already lacking a huge number of mosques to cope with demand', voices the concern of French Muslim minorities about the inadequacy of the existing mosques which are unable to cope with the number of French Muslims – estimated 'between 5.5 million and 6.2 million' – about '7.6 per cent of total population' of France.

The article, considering French authorities' reaction to be 'brutal', warns that such 'brutal' measures will bring unprecedented consequences like 'humiliation', 'alienation' and 'resentment' towards the French authorities in the long run. As it is indicated in the text 'with this brutality, we may be sowing the seeds of radicalisation for the next 20 years. . . the effect could be further humiliation, alienation and resentment towards the government', and here the network bluntly threatens French authorities for the anti-terror operation they are undertaking.

Being critical of the state of emergency, which provides 'extra powers [to French authorities] to conduct raids and detain people on suspicion', that France declared immediately after the attacks, AJE framed the third news article in such a way that indicates how French Muslim minorities, whose 'homes, restaurants and mosques' are 'raided' by French authorities, are suffering from Islamophobia. The article claims that French Muslims are erroneously depicted as 'public enemies' using the warning from the spokesman of the Collective against Islamophobia in France. The news article, under its sub-title 'Charlie Hebdo attacks and Islamophobia', states that

The majority of the raids have been conducted on Muslim homes, businesses and places of worship. Yasser Louati, spokesman for the Collective Against Islamophobia in France, has warned that: "The Muslim minority in France feels like it's being treated as the public enemy."

Despite its claim that the majority of the raids were conducted towards Muslim communities, individual cases and experiences of what it calls 'unfair raids' were presented to support the framing of Islamophobia and Muslim marginalization – which, according to the network, are mounting after the attacks. It tries to justify this frame citing 'Muslim group', 'civil liberties group' and 'about 100 organizations – including France's Human Rights League' which denounced the

move as violations of religious rights and freedoms. It also shows the continuation and threat of these 'unfair raids' towards the Muslim communities quoting the interior minister Bernard Cazeneuve who says 'It's just a start, these operations are going to continue, the response of the republic will be huge, will be total. The one who targets the republic, the republic will catch him'. Moreover, like the second article, the network in the third article warns French authorities over the measures they are taking on moderate French Muslim minorities. AJE, being supportive of Muslim minorities, views the French authorities' anti-terror operations as a 'dangerous path' as indicated in the text, 'civil liberties groups have warned the French state has embarked on a dangerous path after the Paris attacks'.

Though both episodic and thematic frames prevail in the framing of the three articles, thematic frames dominate in the articles since it links the attacks with the US-led war on terror in Syria and Iraq and 'Charlie Hebdo, target of a deadly attack by gunmen in January'. Moreover, this framing dominates since the articles provide 'context and background for the issue at hand', 'emanates from specific instances', is 'less descriptive and more analytical' and tends to provoke societal attribution of responsibility (Papacharissi and Oliveira, 2008: 65). Yet, the stereotyping and marginalization of the French Muslim minorities, onto which the network tries to shed light, shows the existence of episodic frames.

### c) *Focalization*

The focalization of the first article is based on the view of those people who are suffering from similar attacks on a daily basis in the Middle East and sub-Saharan African regions – where international condemnation is missing. The second news article is presented from the perspectives of Muslim minorities in France whose religious rights and freedoms are violated, who lacks places of worship, and who are marginalized and targeted in retaliatory violence. Like the previous article, the positions of Muslim minorities in France is the dominant perspective from which the third article is presented. It attempts to voice the marginalization and unfair treatment that French Muslim minorities have been experiencing which fits exactly into AJE's aim to 'voice the voiceless'. Thus, moderate Muslims in the Middle East and sub-Saharan African regions and France's Muslim minorities are the focalization of the three news articles.

## VII. CONCLUSION

The endeavor to embark on this article was to answer the question 'How does AJE frame the French Government's domestic reaction to the 13 November 2015 Paris attacks in its news?' Making Muslim minorities, French authority and ISIL the three dominant categories, AJE framed France's internal response as a

threat to the country's Muslim minorities. Dominated by thematic frames, the network in its frames tried to distinguish terrorism from Islam. AJE is also critical of the domestic reaction of French authorities in the wake of the attack. The framing shows that the anti-terror operation and the state of emergency taking place in the aftermath of the attacks marginalizes and excludes the French Muslim minority who are already suffering from Islamophobia since the aftermath of the 9/11 attacks in US and the Charlie Hebdo attack. It contested the French authorities' assumption that mosques are places where radicals are found and recruited and warns of the danger of marginalizing, excluding, and targeting the minority. Moreover, it cautions a backlash that such marginalization and targeting of the minority groups will result in, indicating the rise of homegrown terrorism – a challenge that many European countries are facing these days.

In its attempt to distinguish Muslim minorities from ISIL, the network ends up voicing the opinion of France's Muslim minorities, who it views as being marginalized and whose religious rights and freedoms are jeopardized. This is in line with the political perspective that it promotes and the pan-Arab views that it stands for. This leads the channel not only to categorically differentiate Muslims from terrorists but also to contest such dominant media discourses that perceive and broadcast the two as being identical to one another.

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## APPENDICES

*Appendix I:* News article one: Fear and confusion in Paris after deadly attacks (November 14 2015)  
<http://www.aljazeera.com/news/2015/11/reports-shooting-restaurant-central-paris-151113211237312.html>

*Appendix II:* News article two: Activists decry mosque closures in France (December 3 2015)  
<http://www.aljazeera.com/news/2015/12/activists-decry-mosque-closures-france-151203182605655.html>

*Appendix III:* News article three: From Charlie Hebdo attacks to a state of emergency (January 6 2016)  
<http://www.aljazeera.com/indepth/features/2016/01/charlie-hebdo-attacks-state-emergency-160106125210613.html>

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## Community Participation in Natural Resource Management in Madurai District-TN INDIA

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**Abstract-** This paper basically deals with the dynamics of natural resource management in Madurai District. According to Singh and Singh (2007) Natural Resource Management is usually a group action programme involving the entire population of the watershed. The ninth five year plan document also stated that development programme could be implemented successfully only with the involvement of people. It is imperative to ensure people's active participation in all, phases of planning and implementing the programme. But there is no universality acceptable measure or index of people's participation the necessity of developing scales in view of its importance. The following questions were posed while taking up this study - whether NGOs are superior to the GOs in enlisting the people's participation imparting knowledge and to adoption of technologies..Secondly what type of participation is more effective for planning and implementation of the programme and finally what are the attributing factors for high performance of an organization. To explore suitable and concrete answer to three questions, a study was needed. Besides an effort was also made to identify the perceived constraints in participation and reason for the non-adoption of recommended integrated watershed technologies selected personal and social psychological factors, their relationship, relative importance, their direct and indirect efforts as participation.

**Keywords:** *NRM, watershed, government organization, NGOS and community participation.*

**GJHSS-C Classification:** *FOR Code: 050209*



*Strictly as per the compliance and regulations of:*



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Dr. Singarayar Britto S<sup>o</sup> & Dr. Santhiya Rani<sup>o</sup>

**Abstract-** This paper basically deals with the dynamics of natural resource management in Madurai District. According to Singh and Singh (2007) Natural Resource Management is usually a group action programme involving the entire population of the watershed. The ninth five year plan document also stated that development programme could be implemented successfully only with the involvement of people. It is imperative to ensure people's active participation in all phases of planning and implementing the programme. But there is no universality acceptable measure or index of people's participation the necessity of developing scales in view of its importance. The following questions were posed while taking up this study - whether NGOs are superior to the GOs in enlisting the people's participation imparting knowledge and to adoption of technologies..Secondly what type of participation is more effective for planning and implementation of the programme and finally what are the attributing factors for high performance of an organization. To explore suitable and concrete answer to three questions, a study was needed. Besides an effort was also made to identify the perceived constraints in participation and reason for the non-adoption of recommended integrated watershed technologies selected personal and social psychological factors, their relationship, relative importance, their direct and indirect efforts as participation, knowledge and adoption levels were the other aspects of the study. Finally the suggestion perceived by the beneficiaries for effective participation and adoption of practices in watershed areas were also enumerated. This research reviews the role of Community including panchayats in environmental governances and critically examines ways to balance empowerment of panchayats without compromising the participation of the community. Degradation of Natural Resources and Impacts Health Impacts: Management and conservation of natural resources is important for the maintenance of health in addition to the needs of food production and ecological considerations. Water pollution due to untreated sewage contributes to high coliform counts resulting in high infant morbidity and mortality. Economic Impacts: Loss of availability of natural resources for the population, which is dependent on them for their livelihood. There could also be loss of productivity or reduction in crop production due to pollution or closure of industries to comply with air quality standards. Ecosystem Impacts: Contamination of ground aquifers, land degradation due to water logging, intrusion of seawater into ground aquifers, loss of water bodies etc, Displacement Impacts: Environmental degradation and non-availability of natural resources forces dependent livelihoods to migrate in search of alternate subsistence living.

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**Keywords:** NRM, watershed, government organization, NGOS and community participation.

## I. INTRODUCTION

Natural resources are the foundation from which rural poor can overcome poverty. Poverty is still very much a rural problem. One in five of the world's inhabitants – some 1.2 billion people – live in extreme poverty and 75 per cent of these live in rural areas. Their livelihoods depend on natural resources, their capacity to use and manage them effectively, and the institutional environment in which natural resource management strategies are designed and implemented.

Rural poor people are not just 'the poor'; they have faces and names. They are real people: poor farmers, poor fishers, poor nomads and poor women producers. Overcoming poverty means individual and collective empowerment, strengthening productive and income generating capacities and increasing opportunities. This requires a clear understanding of the activities of poor people and of the natural, social, economic and political environment in which they live. It also requires supportive policies, institutions, services and investment. The last two decades have witnessed a paradigm shift in conservation and Natural Resource Management away from costly state-centered control towards approaches in which local people play a much more active role. These reforms purportedly aim to increase resource user participation in Natural Resource Management decisions and benefits by restructuring the power relations between state and communities through the transfer of management authority to local-level organisations. Yet, the reality rarely reflects this rhetoric.

Three quarters of the world's poorest people live in rural areas, and their livelihoods depend on farming, pastoralism, forestry, and artisanal fishing – all of which can be subsumed under the term "agriculture". Support to agriculture is well recognized as essential for poverty reduction and for securing people's right to food. Agriculture is also recognized as an engine of pro-poor growth (OECD, 2006; World Bank, 2007; Oxfam, 2009). According to OECD DAC, "Agriculture connects economic growth and the rural poor" but "its importance goes beyond incomes and reduces poverty by lowering and stabilizing food prices; improving employment for poor rural people; increasing demand for consumer goods and services, and stimulating growth in the nonfarm economy" (OECD, 2006). Secure access to

natural resources and their sustainable management is, in turn, key for agriculture-based livelihoods. Today, this is particularly important as climate change and growing competition over scarce resources (notably land and water) affect the natural resource base for agriculture and for rural poverty reduction (Brunori, *et al.*, 2008; World Bank, 2007; Nelleman *et.al*, 2009). Moreover, secure access to natural resources is at the core of poor rural people's entitlements as Community, as rights over resources are often linked to membership in social organisations, recognition of collective identities, and access to services.

It is reported that India is currently losing between 5 to 7 Mil. Hectares of food lands every year due to soil degradation. Among the poor people about 3.7 per cent in the world. Among the poor people about in India out other 329 million hectares (mi. hec) of geographical areas, only 264 million hectares has potential for agriculture production. Land degradation has taken place on 175 Mil hectares that is water erosion on 111 Mi. Hectares, wind erosion and acidity on 39 Mil. Hectares and associated special problem on 25 Mil. Hectares (Ashokaman *et.al*. 2997 and grenal, 1997). It is estimated that about 6000 million tons (mi. Tonns) of soil is eroded annually (Swamination 1996. In India more that 70 per cent of the population depends on agriculture and rarely three fourth of the total area land depends on rain. The forty millions of farmers in India are cultivating at dry land is linked with the vagaries and mercy of the monsoon, it was reported that the Natural Resource Management through Integrated watershed development programme (IWDP) were launched during the late Seventeen the and Eighties.

*Borrini-Feyerabend* et al. 2004 in his book throughout the islands of the Caribbean, initiatives are underway to engage communities in co-management of natural resources. The stated rationale is often that community involvement can help to reduce the degradation of marine and terrestrial biodiversity, address resource use conflicts, improve the community's quality of life and provide opportunities for economic activity. Other goals include improved governance through building stronger community institutions and increased community capacity, empowerment and voice, which can in turn provide a vehicle for strengthening local governance in other spheres of social and economic development.

The issue of control over natural resources is considered closely linked to issues of power or good governance, in particular within resource-rich African countries. "Access and control over resources in Africa is considered the major governance issue, especially for rural people, and is the bread and butter issue on which democracy must deliver. NRM [Natural Resource Management] is central to good governance and increasing enfranchisement of rural peoples", argues a 2002 USAID report (P-3).

*Borrini-Feyerabend* et al. 2004 in his book throughout the islands of the Caribbean, initiatives are underway to engage communities in co-management of natural resources. The stated rationale is often that community involvement can help to reduce the degradation of marine and terrestrial biodiversity, address resource use conflicts, improve the community's quality of life and provide opportunities for economic activity. Other goals include improved governance through building stronger community institutions and increased community capacity, empowerment and voice, which can in turn provide a vehicle for strengthening local governance in other spheres of social and economic development.

The objectives of the study are

1. To study the socio economic background of the respondents.
2. To measure the extent and types of participation of beneficiaries in different stages of planning of Natural Resource Management programme in Government and Non-Governmental organization.
3. To compare the knowledge level of beneficiaries on different components of Natural Resource Management programme of the Governmental and Non-Governmental organization and
4. To determine the adoption level of different Techniques of Natural Resource Management by the beneficiaries of the Government and Non Governmental Organisations.

## II. RESEARCH METHODOLOGY

Various methods are available to collect for a study. It is the responsibility of the researcher to select the appropriate method for collecting adequate, accurate and reliable data. Especially in case of primary source of information the researcher adopt interview method as a best method of data collection. This study hence adopted interview method with help of structured interview schedule for the collection of data from respondents. This approach in data collection helped the researcher in many ways. Initially, most of the respondents were cynic to answer to the questions relating to Natural Resource Management, but one to one approach resulted in providing a room to clarify their doubts. However the researcher spent enough time to elucidate the mission of the study. The researcher also adopted focused group interview method (FGD) with help of semi-structured interview to elicit information from the general public about the community participation on Natural Resource Management.

The researcher always stayed with the respondents during the data collection. It enabled the researcher to build the rapport with the respondents and got ample opportunities to collect the data and information from the field, moreover it had been the participatory rural appraisal (PRA) method.

### III. HYPOTHESES SET FORTH FOR THE STUDY

In order to test the background of postulated relationship of attributes as per the review of literature and based on the objectives and assumptions underlying the present study, the following hypothesis were framed.

1. There will be no difference in the extent of participation of beneficiaries in different activities of Natural Resource Management between the governmental and N G O Natural Resource Management projects.
2. There will be no difference in knowledge level on Natural Resource Management project components among the beneficiaries of governmental and N G Os Natural Resource Management activities.
3. There will be no difference in adoption level of Natural Resource Management practices among the beneficiaries of the governmental and N G Os projects.

4. There will be no relationship in personal and socio-psychological characteristics of beneficiaries on their extent of participation, level of knowledge and adoption of Natural Resource Management components between the Natural Resource Management beneficiaries of the governmental and N G Os.

### IV. CONCEPTUAL FRAMEWORK FOR THE STUDY

This section provided an insight to develop the theoretical frame work which served as a guidance to identify the independent variables for the present study. Some of the variables were also identified after discussion with extension scientists and extension staff in the study area. Based on this, a conceptual model has been developed and represented in figure-1.

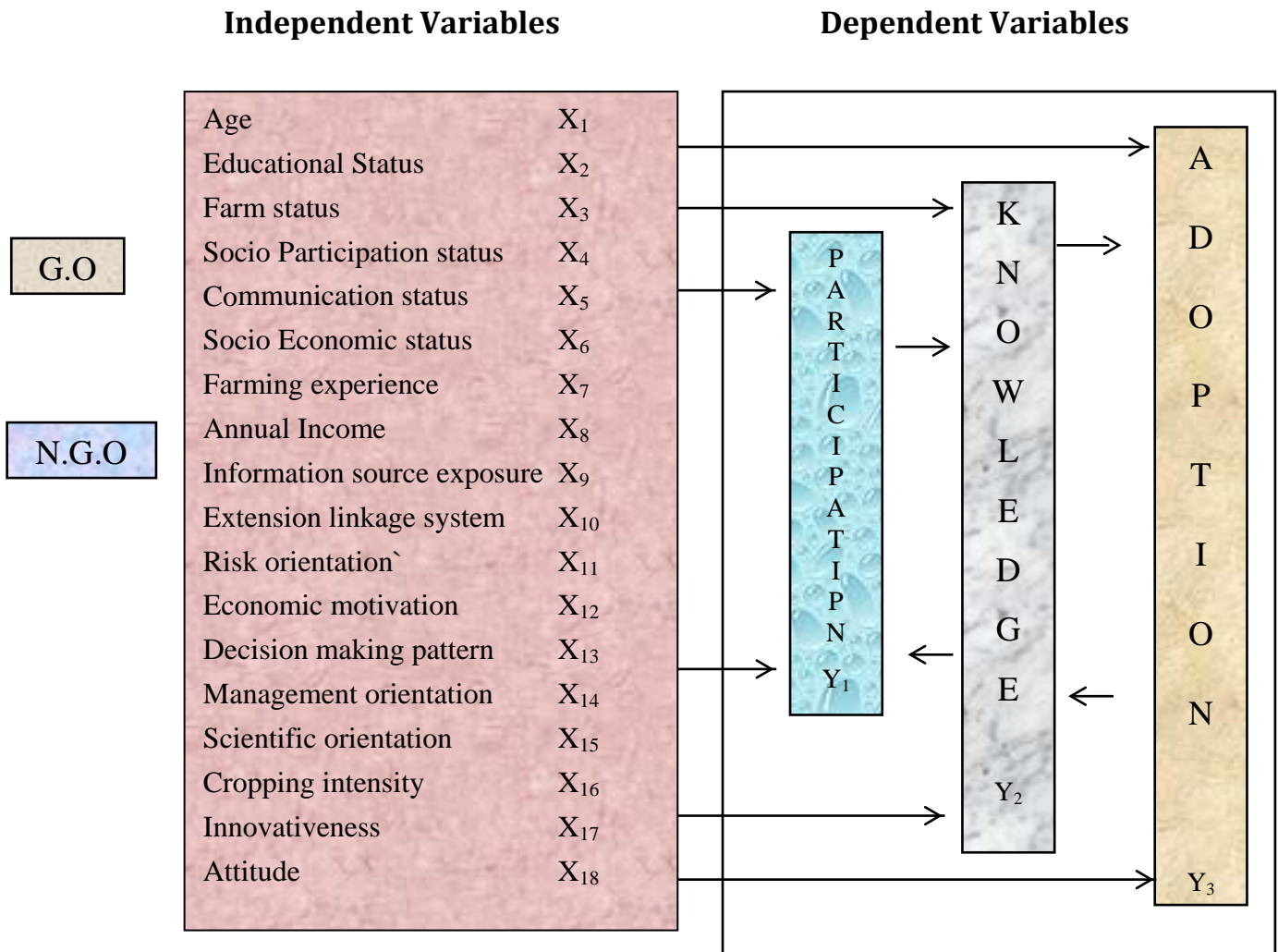


Figure 1: Conceptual Model

Age

The age of the respondents signifies the level of maturity and to what extent they are liable to their family /social commitment and performing home chores. In general the middle aged is more committed than the

young this productive aged group is equivalent to farming functions and its other activities. In the present study, the age among the respondents are categorized as below 35 years, 36 yrs to 45 years and 45 years and above age wise classification as shown in Table-1.

Table 1: Age-wise Distribution of the Respondents

S.No	Respondents	The age			
		Below35years (young)	36 years to 45 years (middle)	Above 45 years (old)	Total
1	Marginal farmers	201	37	9	247
		(81%)	(15%)	(4%)	(48%)
2	Small farmers	119	30	21	170
		(70%)	(18%)	(12%)	(33%)
3	Large farmers	75	7	21	103
		(73%)	(7%)	(20%)	(20%)
<b>Total</b>		<b>395</b>	<b>74</b>	<b>51</b>	<b>520</b>
		<b>(76%)</b>	<b>(14%)</b>	<b>(10%)</b>	<b>(100%)</b>

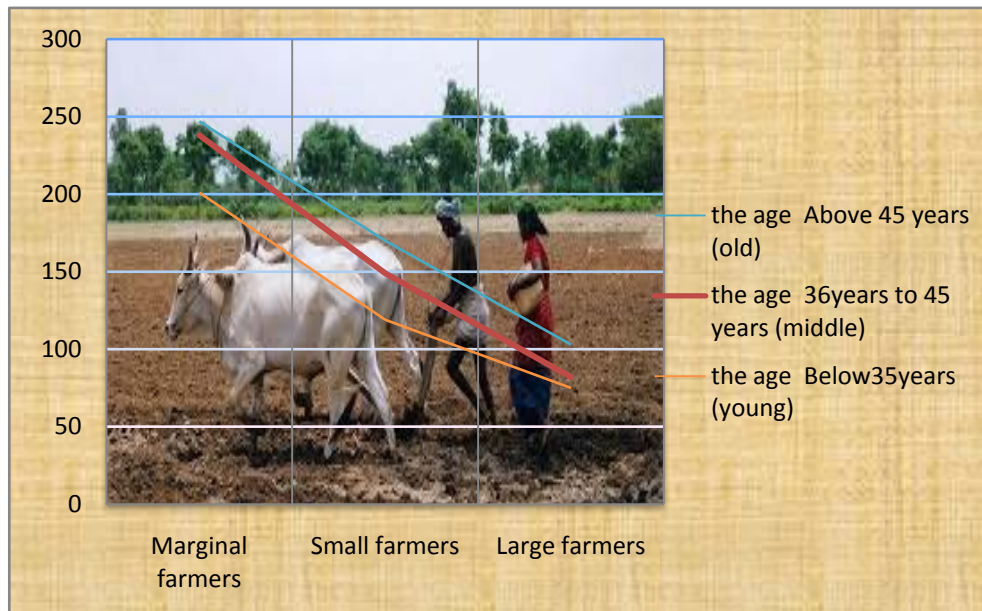


Figure 2: Age-wise Distribution of the Respondents

Age is one of the demographic factors especially in the farming field. At present, the adults are unwilling to involve in the farming activity. The researcher made its open-ended for the lower age limit and upper age limit.

The details relating to the age of the respondents provided in the above table indicates that 247 (48 %) respondents are marginal farmers, 170 (33%) respondents are small farmers and 103 (19 %) respondents are large farmers among 520 farmers. In the marginal farmers 64 (26 %) of the respondents are at the age of below 35 years, 73(30%) respondents are of between 36 to 45 years old and a majority of 110 (44%) respondents are of above 45 years old.

At the small farmers 47(28%) respondents are at the age of below 35 years, 36 (21%) respondents are of 36 years to 45 years old. A majority of 87 (51%) respondents are in the age of above 45 years old.

In the category of Large farmers a majority of 52(50%) respondents are in the age group of above 45 years old.35 (34%) respondents are in the age between 36 years to 45 years that is middle aged and 16(16%) respondents are below in the age of 35 years that is young aged. The mean age of respondents is 37 years.

V. LITERACY LEVEL

Education represents the formal education that the respondents have had. Since the level of education

is one of the important factors which determines the level of understanding of the characteristics of the sample responders. Further the higher education of responders helps to empower faster than lower grade education. The level of education is grouped in to

illiterates, can sign (knowing only signature putting), primary level, Secondary level and graduation. The level of education among the respondents is illustrated in Table- 2.

*Table 2:* Literacy Level of Respondents

Sl No.	Respondents	Illiterates	Primary education	Secondary education and above	Total
1	Marginal farmers	216 (87%)	28 (11%)	3 (1%)	247 (48%)
2	Small farmers	98 (58%)	56 (33%)	16 (9%)	170 (33%)
3	Large farmers	23 (22%)	38 (37%)	42 (41%)	103 (20%)
<b>Total</b>		<b>337 (65%)</b>	<b>122 (24%)</b>	<b>61 (11%)</b>	<b>520 (100%)</b>

Source: Primary Data





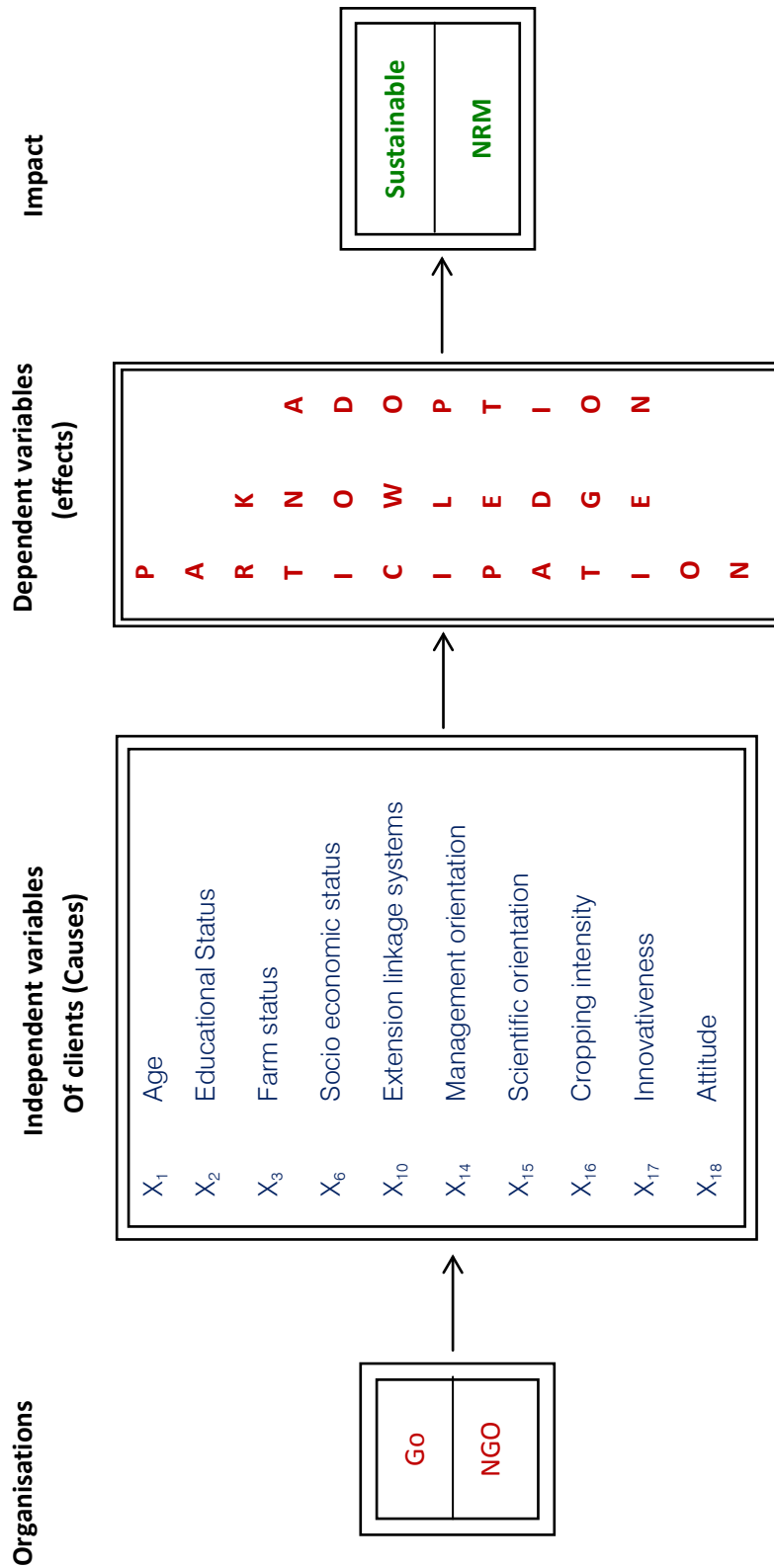


Figure 3: Literacy Level of Respondent

At the high performing NGO NRM project, a maximum percentage of farmers were observed in functional, consultation information giving, material incentives or interactive participation types and very negligible percentage was observed in non-

participation. The farmers also indicated similar types of participation. The reasons might be that High Performing N G O established its familiarity, rapport and credibility among the farmers. NRM project had been initiated based on local needs and problems with better

solutions, conducted more educational programmes, planned and implemented with the beneficiaries and this might have influenced towards higher types of participation on NRM project.

The types of participation in of Low Performing- N G O NRM programme, one-third (33.50%) farmers did not participate in NRM activities, whereas, nearly one-fifth farmers were observed in consultation, information giving and passive types of participation. It is found that scientific orientation and attitude acted as important variables in influencing the participation level in High Performing-NGO NRM programme. Favourable attitude and more scientific knowledge would induce the farmers to analysis the technology in a scientific manner to suit to their farm situation. This might have influenced the farmers to participate in the NRM programme. It indicates that a unit's increase in risk orientation, scientific orientation, innovativeness and attitude, *ceteris paribus* would result in increase in participation level to the extent of 7.12, 6.69, 18.97 and 7.39 units respectively. Similarly, a unit of increase in educational status would result in reduction in participation by 11.46 units. The farmers with risk bearing capacity, innovativeness, and favourable attitude and oriented towards scientific methodology might have enhanced the involvement in activities to attain higher profitability form the dry land technologies. Educational status probably hindered the participation because the farmers were able to acquire the relevant information without involvement through other communication media

## VI. CONCLUSION

Based on the results, the following implications are derived which could be used to plan the future extension strategies in a better manner. The scale developed to measure the extent of people's participation in different stages of planning and implementation of NRM would serve as a useful tool for operational level NRM programme staff. This will be useful to detect the exact weakness and due attention could be given to overcome deficiencies and ensure better involvement of people in the programme. Secondly, the higher the level and type of participation, more will the knowledge and adoption of technologies which indicates that to increase the knowledge and adoption of practices, the beneficiaries should be involved in planning and implementation activities of the programme. Thirdly, the high performing groups used various participatory approaches to enlist the people's participation. It indicates that more thrust can be given to participatory approaches for successful implementation of development programmes in general and NRM in particular. Fourthly, Educational status, extension system linkage scientific orientation, innovativeness and attitude do play significant role in participation and adoption of NRM technologies. The implementing

agency has to give more importance to educate people, to increase scientific knowledge and develop the favorable attitude by using different extension teaching methods.

Fifthly, as the government NRM programme beneficiaries expressed lack of knowledge about programme as constraints in participation, the awareness has to be created about programme by using different media and methods before planning and implementation. Sixthly, the availability of funds for N G Os is a major stumbling block to implement programme, hence the Central and State governments should provide necessary finance based on the activities and performance of N G Os in NRM. Seventhly, while implementing NRM technologies in any community and public lands, emphasis should be given for community empowerment and involvement and finally the NRM can be implemented jointly with collaborative action of G Os and N G Os so that both can attain the benefits and complement and supplement each other thereby the beneficiaries stand to gain.

### *a) Strategic mechanism for effective planning and implementation of NRM programme*

For effective and efficient planning and implementation of NRM programme, both the G O and N G O should have a common *modus operandi*. Both at organisational and field level they should have co-operation and collaboration so that both can complement and supplement each other. NRM programme could be implemented jointly so that both the organisations can gain benefits. The G O can utilize the services of dedicated N G Os workers to ensure people's participation, whereas N G Os can utilize the services of technical expertise and funds available from GO for effective planning and implementation of Natural Resource Management programme.

For effective planning and implementation of NRM project the following strategies are worth considering.

- ❖ Consistent and effective policies are needed for the protection, conservation and maintenance of soil and water resources.
- ❖ Development of NRM technologies that are technically and environmentally sound, economically viable, socially and culturally acceptable and which may lead to sustainable land use.
- ❖ Create awareness of land degradation and encourage adoption of technologies through the use of different media and extension teaching methods.
- ❖ Establishment and strengthening of linkages among researchers, extensionists and farmers for effective and efficient transfer of technologies.

- ❖ adoption levels of NRM practices, the implementing agencies should encourage and initiate Self-Help groups, NRM associations, credit management groups in NRM areas for effective planning and implementation of programme.
- ❖ NGOs were found better in enlisting the participation; the government organisation should involve local N G O or private organisation for effective planning and implementation of NRM programme and to induce higher participation level of local people.
- ❖ For effective and efficient execution of the programme the planning should be based

#### *Suggested model*

For effective planning and efficient implementation of NRM programme both G O and N G O can undertake programme on collaborative and Co-operation basis. While execution, the implementing agency has to be considered as the clientele felt – needs and their characteristics, which will enhance participation and adoption of NRM technologies ultimately leads to sustainable development.

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## Opportunities and Barriers of Exclusive Breastfeeding in South Western Oromia, Ethiopia

By Diribe Makonene, Nega Jibat & Bisrat Tesfa

*Jimma University*

**Abstract-** Breast milk is an optimal nutrition with no substitute for an infant. The advantage gained from exclusive breastfeeding in the first six months is paramount for the infant's health. To understand mothers' practice of exclusive breastfeeding identifying and examining factors affecting exclusive breastfeeding is vital. The aim of the current study was, therefore, to identify major factors that determine the practice of exclusive breastfeeding among South Western Oromia specifically in Jimma and Wo liso towns. Towards this end, a cross-sectional study was conducted using both quantitative and qualitative study approaches. A total of 135 mother-infant pairs attending maternal and child health (MCH) at public hospitals in the two selected towns were interviewed. Six (6) key informant interviews, 6 FGDs and observations of mother-infant conditions were conducted. Quantitative data was analyzed using SPSS and qualitative information was thematically analyzed. The breast milk initiation is 100% at the study site out of which 80% of them were exclusively breastfed up to two months of age while only 48.9% continue exclusive breastfeeding up to six months. Factors identified as facilitators of exclusive breast feeding include knowledge of mothers, personal satisfaction, family support, media and visits to health institutions. Working condition of some employed woman, perception of insufficient milk, health condition and advises from their family member or neighbors are identified as barriers to the practice of mothers' exclusive breastfeeding.

**Keywords:** *exclusive breastfeeding, facilitators, barriers, oromia.*

**GJHSS-C Classification:** *FOR Code: 370199*



*Strictly as per the compliance and regulations of:*



# Opportunities and Barriers of Exclusive Breastfeeding in South Western Oromia, Ethiopia

Diribe Makonene<sup>α</sup>, Nega Jibat<sup>σ</sup> & Bisrat Tesfa<sup>ρ</sup>

**Abstract-** Breast milk is an optimal nutrition with no substitute for an infant. The advantage gained from exclusive breastfeeding in the first six months is paramount for the infant's health. To understand mothers' practice of exclusive breastfeeding identifying and examining factors affecting exclusive breastfeeding is vital. The aim of the current study was, therefore, to identify major factors that determine the practice of exclusive breastfeeding among South Western Oromia specifically in Jimma and Wo liso towns. Towards this end, a cross-sectional study was conducted using both quantitative and qualitative study approaches. A total of 135 mother-infant pairs attending maternal and child health (MCH) at public hospitals in the two selected towns were interviewed. Six (6) key informant interviews, 6 FGDs and observations of mother-infant conditions were conducted. Quantitative data was analyzed using SPSS and qualitative information was thematically analyzed. The breast milk initiation is 100% at the study site out of which 80% of them were exclusively breastfed up to two months of age while only 48.9% continue exclusive breastfeeding up to six months. Factors identified as facilitators of exclusive breast feeding include knowledge of mothers, personal satisfaction, family support, media and visits to health institutions. Working condition of some employed woman, perception of insufficient milk, health condition and advises from their family member or neighbors are identified as barriers to the practice of mothers' exclusive breastfeeding. The significance of having knowledge on practice of exclusive breastfeeding was evidenced with the logistic regression model and results from the qualitative analysis. A linear regression analysis shows that increase in mother's educational level have strong statistically significant association with level of exclusive breastfeeding. The prevalence of exclusive breastfeeding was relatively low (48.9%) hence to promote the practice of exclusive breast feeding creating supportive environment by focusing on facilitating factors and setting strategies to overcome the challenges should be the focus area for policy interventions. Further investigation of how traditional believes influence the practice of exclusive breastfeeding in the rural part of the region is commendable.

**Keywords:** exclusive breastfeeding, facilitators, barriers, oromia.

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## I. INTRODUCTION

Exclusive breastfeeding (EBF) can be defined as giving your baby only breast milk with no supplementary feeding of any type (solid or liquid foods, water, juice or animal milk) except for minerals, vitamins and medications prescribed by a doctor or healthcare worker when medically indicated (UNICEF 2010). Nutrition experts advocate that EBF plays a great role in protecting infants against common infections and reducing the frequency and severity of infectious episodes and minimizing infant mortality by 13 percent (WHO 2001; Nankunda 2006). A report by UNICEF (1999) expresses the importance of EBF as:

*If every baby were exclusively breastfed from birth, an estimated 1.5 million lives would be saved each year. And not just saved, but enhanced, because breast milk is the perfect food for a baby's first six months of life – no manufactured product can equal it.*

The report shows that breastfeeding contains all nutrients needed for a baby; it plays preventive role from diseases even from the leading ones for infant mortality; and it supports normal and healthy growth. As a result, all babies regardless of where they are can benefit from EBF. Breastfeeding also has psychosocial benefits as it lays a foundation of love; builds caring and trusting relationship between the baby and the mother (UNICEF 1999). Additionally, breastfeeding has economic benefits by reducing cost of purchasing infant formula and expenses related to medication resulted from purchased artificial food which is particularly unaffordable in developing countries. EBF is the single most effective intervention to save 13-15 percent of children's death (Gupta 2008). The practice also prevents mothers from breast and ovarian cancers (Aslam S 2010) and initiation of breastfeeding controls mother's bleeding after delivery. Generally, breast feeding has benefits for infant, mothers and the economy (Leroy, Habicht et al. 2007).

MOH (2004) designed *Ethiopian National Strategy on Infant and Young Child Feeding* document realizing that there is high prevalence of inappropriate child feeding practices in Ethiopia which is better intervened at early ages of infants. According to this document, 47% were exclusively breastfed infants under

six months and more than 80% continued feeding into the child's second and third year (MOH 2004). The same document stated a contrary idea to other implied findings on similar issue regarding the prevalence of introduction of complementary foods be it in solid or liquid form. The document reads (pp.2) as follows: "Analysis of the survey also showed delayed introduction of complementary foods and more than 50% of infants aged six to nine months had not received any solid or semi-solid foods during the week preceding the survey." The National Strategy also reported the existence of harmful infant feeding practices yet the prevalence of EBF by mothers in rural areas is about 70 percent. The document recognizes the need of EBF and committing itself to WHO values attached to the practice by stating its importance as (pp. 8):

*Breastfeeding provides the ideal food for healthy growth and development of infants; it is also an integral part of the reproductive process with important implications for maternal health. As a national public health recommendation, infants should be exclusively breastfed for the first six months of life to achieve optimal growth, development and health.*

Mothers, MCH health workers, program designers and policy makers need to know the major opportunities and barriers of EBF up to six months as it is being strongly recommended by authorities in the field. There are limited published research findings as far as opportunities and barriers of EBF in Ethiopia are concerned. More research is required to further validate the results of prior studies targeting both urban and rural areas in the country. This study was conducted to identify major opportunities and barriers of EBF among mother-infant pairs attending MCH at public hospitals in Woliso and Jimma towns. The specific objectives include: to assess mothers' awareness and attitude towards EBF practice, to examine the major opportunities for effective EBF, to estimate the prevalence of EBF in the study area among mothers with infants during the study time and finally to identify the major barriers (personal, cultural, and socioeconomic) mothers face in practicing EBF. Findings of this research reveal major opportunities that should be further developed to encourage the practice of EBF while making known the barrier also helps in setting action plan for intervention. Hence, it recommends ways of improving situations of the practice to potential stakeholders.

## II. LITERATURE REVIEW

UN organizations such as World Health Organization (WHO) and United Nations Children's Fund (UNICEF), professionals and researchers in the field recommend that infants should initiate breastfeeding within an hour of birth, exclusively feed

breast milk until six months, and continue feeding breast and complementary food till two years or beyond (Sapna 2009; Al-Sahab 2010; Aslam S 2010). Researchers also suggest that mothers should be supported and receive counseling on breastfeeding in general and exclusive breastfeeding in particular from trained and/or peer counselors (Nankunda 2006; UNICEF 2010; Nankunda 2011). Victoria (2005) emphasized improving breastfeeding needs intervention and support to bring behavioral change related to the practice. Creating positive policy environment for breastfeeding and nutrition should also get due attention. Identifying and overcoming barriers to breastfeeding is also commended in a report provided by WIC (2006).

EBF is not a popular maternity practice both in developed and developing countries although it is even lesser in the later (WHO 2001). Literature reveal that a few number of mothers exclusively breastfeed their children beyond four months. For instance, although research literature and professionals suggest that breast milk contains 88% water which is enough for infants' need of water, it is common practice to give water for infants under six months. A study conducted in Malawi showed that 4% infants only breastfed until six months whereas 65% of infants were given food in their first month (Kerr 2005). Yet in prolonged EBF until 9 to 12 months of age, some infants can thrive. However, such prolonged EBF has a risk of nutritional deficiency not only in poor countries but also in privileged ones (WHO 2001).

WHO revised its global recommendation of 4-6 months EBF prevailing before 2001 following findings from a systematic review and expert consultation on the optimal duration of EBF (Fewtrell 2007). According to Fewtrell (2007), comparison of infants who were exclusively breastfed for the first six months were less susceptible to death from gastrointestinal infection than those who started complementary foods earlier. However, these authors have reservations that EBF up to 6 months can limit infants' growth and development because of nutritional and energy deficiencies proportional to their age. Iron deficiency in susceptible infants is among such reported micronutrients. It was also recommended that WHO's recommendation should still wait for more conclusive evidence regarding the duration of EBF (Dyson 2005; Fewtrell 2007). Butte et al., (2002) evaluated whether human milk has adequate nutrients in terms of energy, protein, calcium, iron, zinc, and vitamins A, B6, and D in an assessment of the nutrient adequacy of EBF focusing on growth. Accordingly, different evidences are produced about the effects of EBF on adequacy of micronutrient need of the child. For example, the adequacy of *vitamin A* and *vitamin B6* in human milk is highly dependent upon maternal diet and nutritional status. Maternal diet and

nutritional status in turn depend on whether mother's population is well-nourished or not. On the other hand, EBF enables mothers to meet energy needs of their infants for 6 months. In the case of insufficient nourishment, the organization recommended corrective measures either through maternal and/or infant supplementation, or complementary feeding for infants (Butte et al., 2002). Human milk has adequate protein requirements for the first two months of life after which it needs a plus condition/s for its continuing adequacy (Butte et al. 2002; Aryeetey 2013). Prenatal stores rather than maternal complementation may serve as a source of zinc in case lower milk zinc concentrations occurs (Aryeetey 2013).

The practice of EBF till the first four months is on the rise in many developing countries (UNICEF 1999). The global trend of EBF up to six months increased in the last two decades with modest increment in the developing countries; the prevalence increased in all developing regions where as Central and West Africa showed the biggest improvement (Cai, Wardlaw et al. 2012). Central and West Africa was among the lowest (only 20 percent) among all regions in the world (Sokol E 2007). According to UNICEF (1999), among the top ten developing countries, Ethiopia (74%) ranked 8<sup>th</sup> whereas Mongolia (93%), Rwanda (90%) and Burundi (89%) respectively ranked first to third based on per cent of babies exclusively breastfed under four months old. Compared to the 90 percent 'Universal Coverage' target even for infants aged less than four months (Jones G 2003), Ethiopia's coverage is far lower.

The existence, initiation and duration of EBF varies depending on various biological, bio-social, economic, socio-demographic, cultural and personal factors as well as employment policies (Butte, Lopez-Alarcon et al. 2002; Tan 2011; Kramer and Kakuma 2012; Fewtrell 2007). A study conducted in Malaysia identified area of residence, maternal ethnicity, occupation, smoking status, parity, husbands support for breastfeeding and bed-sharing practice to be associated with EBF (Tan 2011). Infant feeding practices in general and EBF in particular varies across cultures and/or countries as well as among different groups of populations (Leong 2011). Another study conducted in Ghana showed that mother misconceived that EBF up to six months results in impairment of subsequent feeding to infants (Aryeetey 2013).

The ever breastfeeding rate of Ethiopia, Oromia, Addis Ababa and Harari is 96%, 94.1%, 93%, and 99% respectively (CSA 2006; Tewodros 2009). Tewodros et al., (2009) explored determinates of exclusive breastfeeding in Ethiopia based on 2005 Ethiopian Demographic Health Survey (EDHS) data collected from the nine regions and two city administrations in Ethiopia. They found that the overall EBF was about 49% which is very low compared to the

90% Universal Coverage recommendation of WHO. Maternal education, marital status, economic status and infant's age are among the determinant factors strongly influencing the practice. On the other hand, maternal age, place of residence, current employment of women, and access to mass media, attending antenatal care, and sex of the child have no correlation with the practice (Tewodros 2009). High prevalence rate (56%) of EBF up to six months is observed in Arba Minch area rural communities as reported by (Dessalegn 2013) even though it is among the lowest achievement relative to WHO's Universal Coverage recommendation. These author also found strong association between optimal breastfeeding and maternal knowledge, number of births, attending antenatal care, having radio, using family planning and giving birth in the hands of health workers (Dessalegn 2013). Maternal knowledge in turn was strongly associated with paternal educational level. Abera (2012) reported 52% EBF practices among women living in Harer. According to this report, mothers with better income, who follow antenatal care, and delivered in healthcare institutions practice more EBF than their respective counterpart mothers. Similar investigations has been conducted on determinants of timely initiation of breastfeeding among mothers in Goba Woreda (Setegn 2011).

The rate of breastfeeding, timely initiation, and exclusive breastfeeding in Mekele was 98.9%, 60.8%, and 77.9% respectively (Berhe H 2013). Mothers commonly introduce supplementary feeding such as water as early as two months and they consider bottle feedings as a good practice because they assume that bottling keep the food clean. Breastfeeding pattern among immigrant mothers to Israel is found better compared to native mothers in the country. EBF was among the highest (92 percent) for children born in Ethiopia whereas 76 percent for Israeli born children (Rubin 2010). Moreover, immigrant mothers' attitude towards breastfeeding was found positive and duration of breastfeeding was longer than native mothers.

### III. THEORETICAL FRAMEWORK

This research used Salutogenic approach as a guiding principle to look for what creates health and wellbeing than looking for defects (Antonovsky 1996). Thus attention is given for factors that help mothers in practicing EBF. Besides, the study also investigated factors that hinder the practice of EBF which can also directly help to trace out facilitating factors. Salutogenic has two core concepts which is generalized resistance resources (GRRs) and sense of coherence (SOC). The SOC is life orientation or the person's view of life and capacity to respond to stressful situation (Antonovsky 1996). SOC also provides capacity to use GRRs. According to Lindström and Eriksson (2009),

*Salutogenesis is the process of enabling individuals, groups, organizations and societies to emphasize on abilities, resources, capacities, competences, strengths and forces in order to create a sense of coherence and thus perceive life as comprehensible, manageable and meaningful.*

The GRRs can be identified at the individual, family and community levels. According to current studies, GRRs can be any material or non-material resources that encourage the mothers in making practical EBF. People have to be able to use the key elements mentioned in order to control, cope with or overcome barriers as well as taking advantage of the opportunities around them to reach or maintain good health and wellbeing (Lindström and Eriksson 2009). Identifying these resources helps in encouraging breast feeding mothers to use the available resources and opportunities to overcome the challenges they face. These challenges can be any sociocultural constraints including attitude that can be forwarded by her family member or neighborhood that can undermine the importance of EBF. Encouraging mothers to provide water besides breast milk to prevent the feeling of thirsty is an example of such constraints.

In this study, the available resources at individual, family, community and the health care system levels were considered. The available resources at individual level such as knowledge towards the importance of EBF; their attitude and their experiences of dealing with similar cases were also investigated especially if they have children before. At community level, the existence of family support, social support, the availability of supportive education or counseling on EBF & the way they process the information they got from their counselors/friends/peers and from health professionals were also assessed.

Identifying these resources contributes to the knowledge of GRRs. When people perceive that GRRs are available for them, they can easily deal with the challenges. Dealing with stressful situation by using available resources will help them in mastering their life situation and adapting to a healthy behavior which means manageability of life. Mothers who developed the skill of using these available resources or any opportunities that enables them in making practical exclusive breastfeeding by overcoming the challenges would be said to have strong sense of coherence. Having knowledge of these resources will help in encouraging the practice of EBF which in turn promotes health and well-being. The breast feeding practices has dual health benefits, both for the mother and child as it prevents infant mortality rate and the chance of developing breast cancer. Identifying the enabling factors also helps the service providers in encouraging mothers to exclusively breast feed their children by using the available resources and opportunities. In

addition, identifying the barriers/benefits the policy makers and other concerned bodies in setting strategy on how to tackle the challenges which in turn promotes health and well-being.

#### IV. RESEARCH METHODS

A health institution based cross-sectional study was conducted in south west Ethiopia in Jimma and Woliso towns. A mixed approach of qualitative and quantitative methods was used to carry out the study and data were collected from breastfeeding mothers who have infants from 45 days of age to one year. The study was performed from March 1 up to April 30, 2015. All breast feeding women with an infant of 45 days of age to one year living in Jimma and Woliso coming to health institutions in the towns were considered as source population. Including all breastfeeding mothers was not possible due to factors associated to economic and time feasibility. Thus, convenient sampling was performed to determine the study population considered for the study. Accordingly, 135 breast feeding mothers were included.

A semi-structured close and open ended questionnaire was used for an interview. A check list guided in-depth interview was performed. The quantitative data was triangulated with information obtained through observations, key-informant interview and focus group discussions (FGDs). Mothers with infants of 45 days of age to one year were selected to minimize recall bias on their experiences of EBF. This study only considered mothers visiting MCH clinics for child vaccines, family planning and other MCH services to avoid repeated consideration of mothers.

The quantitative data collected through semi-structured questionnaires was double edited, coded and analyzed using software package for social scientists (SPSS v.20). Descriptive statistical analysis involving frequencies of respondents is presented to indicate the socio-demographic characteristics of the populations and the prevalence of EBF according to the residents. Factors presumably significant to determine the EBF were analyzed using regression models to indicate the likelihood of their degree of associations. The degree of statistical significance was determined at 95% confidence interval with margin of error of 5%. The data obtained through extended interview and focus group discussion was analyzed qualitatively by using thematic approach. New emergent ideas or themes are grouped into different categories and interpreted. Confidentiality, oral consent and voluntary participation were considered in data collection and analysis processes.

#### V. RESULTS AND DISCUSSIONS

This section deals with major findings of the study which are presented under different themes in line



with the specific objectives of the study. Simultaneously, the major findings are discussed in relations to other similar studies.

*a) Socio-demographic characteristics of respondents*

Table 1 shows the socio-demographic characteristic of the study participants. Totally 135 individuals were interviewed, out of which seven of them are under 18yrs. The largest age group (45.9%) is between the ages of 25-30 years and (37.8%) is between 18-24 years of age groups. The largest (80%) of the study participants were from urban areas. This might be due to high accessibility of urban mothers to available health facilities in the town. Majority of them (71.9%) are unemployed mothers and 17.8% of the participants are unable to read and write. The high unemployment rate could be due to the fact that the largest study participants were housewives who are dependent on their husbands' income. The data from six key informant interviews and six FGDs were also included in the analysis.

*Table 1:* Socio-demographic characteristics of the study participants

Characteristics		Residence			%
		Urban	Rural	Total	
Education	Not able to read & write	14	10	24	17.8
	primary and secondary	37	8	45	33.3
	high school and above	57	9	66	48.9
	<b>Total</b>	<b>108</b>	<b>27</b>	<b>135</b>	<b>100.0</b>
Occupation	Unemployed	75	22	97	71.9
	Employed	33	5	38	28.1
	<b>Total</b>	<b>108</b>	<b>27</b>	<b>135</b>	<b>100.0</b>
Age	<18	3	4	7	5.2
	18-24	46	5	51	37.8
	25-30	49	13	62	45.9
	31-36	9	4	13	9.6
	>36	1	1	2	1.5
	<b>Total</b>	<b>108</b>	<b>27</b>	<b>135</b>	<b>100.0</b>

*b) Prevalence of Exclusive Breast Feeding*

The prevalence of breastfeeding and EBF practice of mothers are presented in Table 2. Data shows a 100% initiation of breastfeeding, out of which 48.9% practiced EBF up to the age of six months. This result is relatively comparable with the national level prevalence rate (52%) but greater than the results presented in WHO (2015). Out of the rest about 35% of feed breast milk mixed with water and 16.3% feed with milk. About 30% reported as they started additional feeding (i.e. water and milk) below the age of 2 months. Among sub-groups, the percentage of young children who are exclusively breastfed decreases sharply from 80% of infants of age <2 month to 62% of those age 2-3 months and to about 54% among infants of 4-5 months. This pattern is similar to Ethiopian Health Demographic

Survey data of 2011 (CSA 2011). These mothers are asked their reason of starting to give additional feed other than breast milk. Most of them responded that breast milk is not sufficient for their baby and to avoid their thirsty.

*Table 2:* Prevalence of breastfeeding among study population

Characteristics of breastfeeding	Months	Residence			%
		Urban	Rural	Total	
Exclusive breastfeeding	<2	37	6	43	31.9
	2-3	15	3	18	13.3
	4-5	6	2	8	5.9
	>=6	50	16	66	48.9
	<b>Total</b>	<b>108</b>	<b>27</b>	<b>135</b>	<b>100</b>
With water	<2	25	4	29	21.5
	2-3	10	2	12	8.9
	4-5	4	2	6	4.4
	<b>Total</b>	<b>39</b>	<b>8</b>	<b>47</b>	<b>34.8</b>
With milk	<2	12	2	14	10.4
	2-3	5	1	6	4.4
	4-5	2	0	2	1.5
	<b>Total</b>	<b>19</b>	<b>3</b>	<b>22</b>	<b>16.3</b>

*c) Factors Determining Exclusive Breastfeeding*

Feeding only breast milk up the age of six months can be affected by several factors. These factors can be facilitative which encourage mothers to feed their babies only breast milk or hindering factors which enforce mothers to feed additional nutrition in addition to breast milk in less than six months of age. These factors are identified and presented as facilitative and hindering factors based on the quantitative and qualitative evidence. Some of the factors can be considered as both facilitators and barriers which require careful interpretations. For instance, having sufficient knowledge can be facilitator while lack of it can be considered as barriers for mothers to feed their baby only breast milk up to the age of six months. Thus, such kind of factors are interpreted in this study with great care. Both factors (facilitators and barriers) can be attributed to individual, family, society or institution. Accordingly, knowledge of mothers, personal satisfaction, family support, media and visit to health institutions are some of the factors identified at individual, family and organizational levels.

*d) Facilitators of Exclusive Breastfeeding*

This subsection presents factors facilitating mothers' practice of EBF. Different personal, community and institutional level factors operating in various ways are discussed one after the other. How these different factors are linked in the lives of mothers are also considered.

*e) Knowledge of Mothers on Exclusive Breastfeeding*

Having knowledge on the importance of EBF has significant contribution on the practice. As

presented in Table 3, 77 mothers from urban and 23 from rural or (74.1%) of the study participants have knowledge of EBF. However, having sufficient knowledge may not imply good practice. Even though about two-third of the study participants are knowledgeable on EBF, less than 50% reported practicing it (Table 3). Evidence from the qualitative analysis also shows similar results. Thus, most mothers have favorable attitude towards EBF but they are hesitating to rely only on breast milk for six month duration. The significance of having knowledge on practice of EBF was evidenced with the logistic regression model results (Table 4). Accordingly, women with knowledge of EBF are more likely to practice it as evidenced with strong statistical association. This study is in line with the study conducted in Arba Minch in 2013 that shows knowledge has strong association with optimal breastfeeding (Dessalegn 2013) while it differs from the finding of a study conducted in Jamaica where knowledge and practice of mothers on EBF vary (Chatman, Salihu et al. 2004). A linear regression analysis shows that increase in mother's educational level has strong statistical significant association with level of EBF. Educated mothers are 1.7 times more likely to feed their babies exclusively with breast milk [1.7; 95%, CI, 1.4-1.9].

Table 3: Knowledge and practice on exclusive breast feeding

Characteristics		Residence			
		Urban	Rural	Total	%
Have Knowledge about EBF	Yes	77	23	100	74.1
	No	31	4	35	25.9
	<b>Total</b>	<b>108</b>	<b>27</b>	<b>135</b>	<b>100.0</b>
Breast feeding practice	Exclusive	50	16	66	48.9
	With water	39	8	47	34.8
	With milk	19	3	22	16.3
	<b>Total</b>	<b>108</b>	<b>27</b>	<b>135</b>	<b>100</b>

As a participant (22yrs old woman) in the study mentioned, there are challenges that they sometimes experience that can compromise the practice of EBF as "My neighborhood advises me to give water for my child mentioning that the child feels thirsty but I refused them and continued to give only breast milk." This woman has a good knowledge about the benefit of exclusive breast feeding as she mentioned during the interview and she could manage to practice regardless of peer pressure. However, others introduce water and additional food item like milk because of advices of their family members or neighborhoods. A 28yrs old woman described her experiences as follows, "I gave water to my baby at his two months of age to please my neighbors because they repeatedly told me that he feels thirsty."

Table 4: Factors affecting exclusive breastfeeding practice

Factors	B	Sig.	Exp(B)	95% CI .for EXP(B)	
				Lower	Upper
Knowledge of mothers	3.4	0.00	29.3	6.6	129.4
Occupation of mothers	0.38	0.31	1.5	0.7	3.1
ANC visit	1.08	0.35	2.9	0.3	29.1
Husband's education	0.34	0.18	0.7	0.4	1.18

Table 5: Linear regression showing association of mothers' education with exclusive breast feeding

Exclusive breast feed	Unstandardized Coefficients		Sig.	95.0% Confidence Interval for B	
	B	Std. Error		Lower Bound	Upper Bound
Education	1.7	0.139	.000	1.4	1.9

## VI. ORGANIZATIONAL FACTORS

The roles health professionals play in improving the practice of EBF is not easy. As many of the participants reported during the interview, approaches of nurses and doctors are encouraging. The participants of key informant interview also mentioned similar point. As some of the key informant interviewees reported, the health institutions use several approaches to promote EBF. Some of the approaches they mentioned are individual counseling during the ANC follow ups, postnatal education after delivery especially for those who gave birth at health facilities and mass health education. A 25 yrs. old nurse as key informant in in-depth interview stated service approaches they use at Woliso St. Luke hospital as "We appoint a mother who gave birth at this hospital on 14<sup>th</sup> day for postnatal follow up to take weight of the baby and monitor mother's condition if any problem was faced when feeding breast milk; then counseling is provided."

Moreover, many of them mentioned that the involvement of mass media in promoting EBF was also encouraging mothers to practice it. The frequently mentioned sources of information are TV and Radio, education transmitted through published materials such as leaflets. This was observed during the data collection when these mass media are used as means of information dissemination on EBF. Several opportunities were raised as facilitative approach for EBF by FGD participants. Arrangement of nursery in organizational setup for breast feeding employed mothers can be a good opportunity that can encourage EBF and keep mothers in work. In line with the current study, other scholars also mentioned that providing counseling and education on breastfeeding can enhance the practice of EBF (Nankunda 2006; UNICEF 2010; Nankunda 2011).

### a) *Barrier to Exclusive Breastfeeding*

Among those who claim the existence of challenges for EBF, the frequently mentioned were working condition of employed women, perception of insufficient milk, health condition, and advice from their family member or neighborhoods. For some employed mothers, their working condition is a challenge that hinders them from using exclusive breast milk. As a reason for initiation of additional feeding, some of them mentioned that they have to return back to their job as soon as they finished their maternity leave. The issue of maternity leave was a hot agenda for discussion during FGDs. As many of them mentioned, for an employed mother practicing EBF is a dream that can't be true. The participants mentioned that knowing the benefit of EBF cannot be sufficient to encourage the practice unless suitable conditions are arranged for employed mothers. As a result, several options like prolonging maternity leave for six months or arranging nursery at work places were suggested by FGD and interview participants to encourage breastfeeding. Otherwise, EBF remains a challenge for employed mothers who are unable to feed breast milk every two hours. During the interview we encountered two mothers who quit their job to breastfeed their baby. One 22 years old mother presented her case as "*Practicing EBF is unthinkable with my working condition so I decided to quit my job and continue to take care of my baby.*" This mother mentioned that she tried her best to make her baby start additional feeding before two months of age thinking that she has to return back to her job. But as she reported her baby refused to adapt to bottle feeding and lastly she decided to quit her job. There are also other mothers who reported similar cases but some of them tried to keep breast milk at home by milking it manually and keep on feeding their baby using bottle.

Some mothers perceive their breast milk is not sufficient to their baby to provide appropriate nutrient. Similar to the current finding, the study conducted in Ghana in 2013 also showed that some breast feeding mothers perceive that their breast milk is not sufficient (Aryeetey 2013). Besides, some also mentioned promotion of processed powdered milk as the cause of misperception and initiation of additional feeding earlier. For instance, some think that their baby feels thirsty that they introduce water as a supplement. The practice of breast feeding varies from culture to culture as it was also evidenced in other studies (Leong 2011). Hence, for breastfeeding mothers to overcome the challenges they face like advices from their families or neighbors that compromise the practice of EBF, regular counseling has to be given. Counselors can guide the breastfeeding mothers towards the desired behavior by shaping number of identified beliefs that can challenge the practice of EBF (Y. K. Bai 2009). As another challenge, some service providers mentioned the

existence of work load that enforces them to ignore counseling on breastfeeding by only focusing on the services that the mothers are in need by the time of her visit.

## VII. CONCLUSION AND RECOMMENDATION

This study was conducted to understand facilitators and barriers of EBF in Jimma and Woliso towns in south western Oromia. The study concluded that breastfeeding mothers who have less awareness about the importance of EBF can easily be influenced by their neighbors or family members that can undermine the practice of EBF. Besides, strong promotion of the advantages of EBF by national and international stakeholders contradicts with government's lack of commitment to create workable conditions for employed women. These aforementioned conditions tend to be similar across regions in Ethiopia. Therefore, one can easily conclude that optimal level of EBF practice is less likely to be achieved in the country unless these two factors are properly addressed. Hence, to promote the practice of EBF, health service providers should provide ongoing counseling and policy makers have to give attention to creating supportive environment for breast feeding mothers as well as for service providers. Factors identified as facilitators have to be enhanced while barriers have to be minimized or avoided to encourage EBF. Further research is required to investigate how traditional beliefs influence the practice of EBF in Ethiopia.

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# The Creation of Social Welfare Policies: Comparative Analysis between German and Brazilian Experiences

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**Abstract-** The aim of the study was to compare the Brazilian and German social welfare systems, highlighting their similarities and differences and answering the question: have Brazilian social welfare policies moved closer to or farther away from the parent model throughout their historical evolution? The methodology selected for the present study was comparative, with a historical approach. Similarities and differences between the Brazilian social welfare system and Bismarcki an ideals were confirmed, particularly in relation to the failure to incorporate social protagonists in the development of these policies and the involvement of political parties, who serve the interests of distinct social classes, thereby perpetuating the interests of the strongest groups and creating an unequal protection structure and hierarchized benefits. This leads to a population with a low vindicatory performance and reforms that have distinct objectives and are aimed at the private system. Consequently, citizens with equal rights are excluded from the concession of rights and the formation process of these social policies..

**Keywords:** *Brazilian social welfare, German social state, historical evolution, comparative analysis.*

**GJHSS-C Classification:** *FOR Code: 160899*



*Strictly as per the compliance and regulations of:*



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## 1. INTRODUCTION

The principles that guide state interventions aim to improve the welfare of the population through the universalization of rights, institutional unification and the maintenance of workers' salaries in times of social unrest (lack of jobs available). These principles have led to the appearance of distinct social security institutions, which differ from country to country and are determined by the different relationships established between the state and social classes.

Social security models are based on one of two references: the model proposed by Otto von Bismarck in Germany in 1888 and; the model proposed by William Beveridge in England in 1942. The Bismarckian model seeks to maintain workers' salaries in times of social unrest (lack of jobs available) through prior contributions. The Beveridgean model is universal and is valid for all citizens unconditionally, ensuring minimal social standards and the eradication of poverty.

Although there is no model that is purely based on Bismarckian and Beveridgean Principles (each state adapts these models to their own social, economic and political context), the principles of the German model proposed by Bismarck were decisive in the formation of the Brazilian social security system, whereas the

Beveridge model guides the public health system and Brazilian social assistance. Since the focus of the present study is Brazilian social welfare, we will compare its formation in light of the German social state in an attempt to understand the historical phenomenon of the expansion of social security, based on a "pioneer" pension scenario and a model for other capitalist countries.

A number of previous studies have addressed the social welfare situation in Latin American, North American and Central European countries, including analysis of the differences associated with the Brazilian system. One such study was conducted by Malloy (1979), who compared social policies with those found in other Latin American countries. Medeiros (2001) distinguished the historical functions that characterized social programs in Brazil and in central European countries, such as Germany, France and Switzerland, among others, and highlighted the need to improve the profile of social protagonists in Brazil in line with historical developments in these countries. Costa (2005) sought to classify Brazilian social security from a worldwide historical-comparative perspective, based on the transformation of the economy in the capitalist world, using the British and North American economies as a background. Another relevant study was conducted by Caetano (2006), who identified the factors that affect the cost and sustainability of a pension plan based on international comparisons. Concerning the German model, authors such as Oliveira and Teixeira (1986), Braga and Goes de Paula (1986) have portrayed the similarities of the German and Brazilian models, particularly in the Vargas era.

Germany and Brazil were selected for the present study because of the need to understand how the social welfare system was created (Brazil) and to compare it with the social welfare system of a country (Germany) which, as well as having a strong consolidated social welfare basis, serves as an example for the creation of social security policy. Thus, the historical development of the German welfare system involves significant dimensions that can be analyzed in the context of Brazilian history.

Analysis of social welfare policy can be based on two viewpoints: a more intense and particularistic vision and; a more external and generalized view



(Vianna, 1998). The former is based on elements such as the type of financing, access to benefits and services, the size of the population covered, the value of the benefits provided and the programs offered. The latter involves a perspective on how to develop the following aspects: industrialization and urbanization; the mobilization of the working classes; the bureaucratic structure; the type of political regime adopted; the degree of coverage and the scope of the model (Esping-Andersen, 1991; Vianna, 1998; Medeiros, 2001).

The theoretical profile of the present study is based on a more holistic vision of the system, but without the pretension to disregard the other variables as fundamental to an understanding of the formation process of social welfare policy. Therefore, this research investigates which specific combinations of these elements enabled the constitution of the current social security conditions in Brazil.

Given the above, the present study intends to answer the following question: have Brazilian social welfare policies moved closer to or farther away from the parent model throughout their historical evolution? Therefore, the aim of the present study was to use a historical approach to comparatively analyze the conception and development of the Brazilian and German social welfare models, highlighting the similarities and differences between the two. These models are currently in different stages of maturity. The Brazilian model is still in the development phase while Germany has a strong and consolidated social welfare system, which is the result of experience that has been accumulated over more than 125 years. The present study begins with the historical evolution of the German and Brazilian models, seeking to identify points that could improve the debate in relation to the Brazilian experience. Schneider and Schmitt (1998) cited Durkheim when highlighting that it is possible to confront the history of one context with another context and to analyze how the same phenomena evolved in each context as a result of the same conditions, establishing comparisons between their development.

Using this historical-comparative perspective, it was possible to distance ourselves from what Costa (2005) characterized as the reductionism of the "national state", given that analysis of the evolution of the social welfare system is limited to the internal context, ignoring the space time articulation in its development. Thus, it was possible to identify the conditioning factors for the creation of Brazilian social welfare policy, as part of today's global economy, based on a systemic view of reality.

This research used a historical-comparative method that, according to Bloch (1928), cited by Schneider and Schmitt (1998), involves explaining the similarities and differences of two similar systems used in different social environments. This type of analysis

enabled us to conciliate the work of theoretical design and the interests focused on the analysis of specific social processes (German and Brazilian social welfare). The social environments considered in the present study involve societies that are separated by space and time, given that the German social welfare system is much more advanced than the current Brazilian system.

In this method, Bloch (1928), cited by Schneider and Schmitt (1998), identified two moments related to the identification of similarities between the phenomena. One of these was similar and the other was contrasting, where there are working differences between the cases. Using this method, it is possible to identify possible similarities between historical and structural elements, leading to important comparisons of the identities and differences that will help to create a comparative chart.

The comparative procedure of the present study was carried out according to the method proposed by Schneider and Schmitt (1998), using the following stages:

a) *The selection of two phenomena that are effectively comparable*

The Brazilian and German social welfare systems. The comparisons were facilitated by the fact that the Brazilian system, in its initial conception, was molded in the image of the Bismarckian German model, based on compulsory prior contributions and a tripartite contribution system, rather than the Beveridgean model (universalization of benefits).

b) *The definition of the elements to be compared*

The variables to be compared refers to industrialization and urbanization, the mobilization of the working classes, the bureaucratic political structure, the form of political regime adopted, the degree of coverage and the scope of the model (Vianna, 1998).

c) *Generalization*

In this stage, the discovery of common and diverging elements in both countries leads to an articulation between the models, contrasting their realities and identifying possible alternatives to improve the formation of social welfare policies.

This article presents a general panorama of the evolution of welfare experiences in Brazil and Germany in order to ascertain similarities and differences between the two countries and to create a comparative chart based on the following nine aspects: the appearance of welfare; the stance of the state in relation to social policies; intervention by the state in welfare; the coverage of benefits; management and control of welfare; structure; the aims of social welfare services; the aims of reforms and the main problems faced by the welfare system. Final considerations will be presented in a comparative manner, seeking to prove the need for improvements in the design of the Brazilian welfare system in line with molds that have occurred historically

in Germany, without disregarding the complexity and diversity of the contexts.

## II. BRAZILIAN WELFARE IN LIGHT OF THE GERMAN EXPERIENCE

Despite its social, political, economic and cultural differences with Germany, Brazil modeled its social welfare system on the Bismarckian model. According to Ribeiro and Ribeiro (2001), Brazil made this decision because the two countries shared the same corporatist state experience, which would make it much easier to adapt to Bismarck's class propositions.

The origin of German influence in Brazil dates back to the times of colonial Brazil, before the appearance of state law. Araújo (2008) explained that this was mainly due to the influence of the Portuguese, who themselves had experienced a major intervention of German law. Thus, German law contributed to Portuguese law, which in turn, affected Brazilian law.

The Brazilian Constitution of 1934 was based on the Weimar Constitution, with additional civil, political and socio-economic rights, which provided the basis for the formation of Brazilian constitutionalism. The current Brazilian Federal Constitution, which was enacted on the 5th of October 1988, was inspired by the Portuguese Constitution of the 1970's, which was based on the principles of German constitutionalism. According to Araújo (2008), a notable difference between the two constitutions is that the German constitution does not expressly mention socio-economic rights. However, they exist and were not affected by the conception of the social state in Germany. In Brazil, the Constitution of 1988 mentions the principle in article 6 ("Education, health, work, housing, leisure, security, social welfare, the protection of motherhood and childhood and social assistance for the poor are social rights") and reinforces this in titles such as Financial and Economic Order and Social Order. However, unlike in Germany, these principles have not been effectively practiced in the manner predicted by the Brazilian Constitution.

The appearance of the social state in the two countries was mainly driven by labor movements. With the advent of industrialization and urbanization, workers began to claim their right to better working conditions. At the time, they worked in precarious and unsafe conditions, with long working days and low salaries. These claims were made through strikes and union movements in the end of the 19th century and in the 20th century in Germany and Brazil, respectively, threatening the economic and political stability of both countries. However, the process of Brazilian industrialization was much slower than the same process in European countries, such as Germany. In Brazil, this process took place almost 100 years after the first industrial revolution. Significant historical events, such as the First and Second World Wars, as well as the

crisis of 1929, favored industrial development, given that the countries involved in the wars and crises decreased their exports. These events therefore forced Brazil to invest in order to supply its internal market.

According to Vögel (1989), the beginning of social policy in the German Republic is strictly linked to the history of labor movement and political struggles to obtain individual rights, social assistance and security. The same author stated that the driving force of these movements was the indignation caused by the miserable lives of the workers and their families, as a result of their political and social exclusion and neglect. These conditions were also observed in Brazil during the time of the Old Republic. Malloy (1979) highlighted the similarities between the appearance of social security in Brazil and Germany: "The first modern social security system was created in Germany in 1889, as an integral part of the policy of promoting national unity, under Bismarck's aegis of a strong state that intended to control the working class and promote social peace through social policies. Especially after 1930, the policy of social security in Brazil has been part of a general approach to the relationship between the state and society, which has a strong similarity to the Bismarckian model of modern statist policy (Malloy, 1979, p.7).

Before workers claimed for better working conditions in both in Germany and Brazil, the state adopted a completely liberal stance on social policies. In Brazil, according to Rodrigues (1968), cited by Oliveira and Teixeira (1989), the state claimed that it was impossible to reduce the length of the working day or to improve wages as doing so would damage the independence and autonomy of free enterprise. In Germany, according to Vögel (1989), the state should only worry itself with internal and external security, and all other subjects should be left to the free power of the market and society.

In both countries, the state began to perceive that intervention in social and labor issues would enable them to crush socialist ideas, calm workers and promote social order, which was being threatened by the union and labor movements. Ritter (1991) characterized the activity of the state in this context as a form of "defensive integration", in which labor laws were created in order to pacify the workers and conserve political, social and economic order. Both Otto von Bismarck in Germany and Arthur Bernardes in Brazil used social policy as a way to weaken social movements and union/socialist trends, thereby binding working relationships to the state and ending the previous liberal stance. In addition, the dissemination of social security laws in both contexts was more the product of a political conception than the result of a long political compromise (Alber, 1989) and was not due to a paternalistic stance on behalf of the state, but rather an attempt to calm workers and maintain social order (VÖGEL, 1989). Since Brazilian workers were covered by

welfare policies and provided with the exclusive structure of retirement plans and pensions, it could be stated that the intention was to divide the working class and coopt key sectors of the economy (MALLOW, 1979).

In 1923, insurance in Germany and Brazil were unified in coffers. However, the new welfare institutions that appeared in these countries were only available to a certain type of professional, such as sailors, bankers and merchants, with most workers unable to avail of social security (ALBER, 1989; OLIVEIRA and TEIXEIRA, 1989). Consequently, the privileged rights of certain workers led other social groups to feel a need for change and legal projects were created to include the remaining workers in the roster of benefits, thereby increasing the coverage of the welfare system each year.

Despite the end of the state's liberal stance on social issues, it was not actively involved in the administration and management of the recently-created welfare systems. The presence of public authorities was only foreseen in the form of contracts that controlled the activity of CAPs in Brazil through the National Employment Council (CNT) and external agencies (OLIVEIRA and TEIXEIRA, 1989). In Germany, these contracts were organized by the workers unions, which sought to promote security in the working environment, provide a supplement for old age and pensioners, and solve other workers issues. According to Ritter (1991), this represented a significant aspect of the modern German social state.

Over time, the main characteristic that appeared in the German context, which was adopted in Brazil and continues to the present day, was the fact that those who were insured contributed part of the resources based on their salaries, while their employer also made a contribution, based on the company's revenues. According to Ritter (1991), this system cannot be characterized as redistribution between capital and labor, but rather a redistribution that occurs within the working class itself, given that they pay for those who don't work. Börsch-Supan and Wilke (2003) demonstrated that the German welfare system involves a strong actuarial connection between income over a lifetime and the benefits of retirement and pension, thereby playing a less significant redistributive role than in other countries. On the other hand, as reported by Vianna (1998), despite the fact that the German system is segmental, it can still be considered as one of the most protective and extensive in terms of the population covered. According to Medeiros (2001), the redistributive character of the Brazilian welfare state was less extensive. As well as the limits on the groups covered, it is more closely based on a system of horizontal redistribution, between individuals of the same group, than vertical distribution, between different groups. This horizontal redistribution is associated with

eligibility criteria and the provision of benefits based on previous contributions to the system, thereby hindering access to social coverage for many citizens.

However, it appears that in both Brazil (Boschetti, 2003; Batich, 2004) and Germany (Ritter, 1991), there has been a trend towards universalization, which has been consolidated year on year as a result of the following events: the decrease in unemployment rates and informality; the redistribution of resources through the inclusion of previously marginalized social groups with formal contributing workers, such as providing welfare for rural workers; the creation of benefits such as the maternity and family salaries in Brazil; the provision of welfare for artisans, entrepreneurs, the disabled, war victims and orphans in Germany; as well as the generous transfer of benefits from West Germany to East Germany after unification. However, welfare coverage has always been greater in Germany, which has reached more and more workers through its social protection programs down through the years. For example, the coverage of the German welfare system in 1960 was 77% of the population, reaching 90% in 1980 (Alber, 1989). In Brazil, social welfare covered only 7.4% of the population in 1960 and 9% in 1970 (Malloy, 1979).

This context created the basis for a redistribution of income, since all workers should pay for these new expenses, which were frequently welfare-based, thereby moving away from a contributory system. This redistribution came from the fact that welfare offers satisfactory returns to those who earn little and less advantageous returns for those who earn more. According to Esping Andersen (1991), this redistribution could endanger the efficiency of the system.

Social security in Germany has a much wider spectrum than in Brazil. As well as retirement and pension benefits, the German model includes benefits for workers, employees and entrepreneurs, while also assisting children, encouraging education, offering accident and catastrophe indemnity, indemnity for victims of crime, social security for the disabled, health plans and improvements in income, housing and education (Alber, 1989; Ritter, 1991).

The housing program, which was also a characteristic of social security in Brazil in the 1930's, is a valid indicator of the different objectives of the services and programs created in both countries. In Germany, the housing program was created in order to increase rent equality, by promoting equality and associating social rights with the minimal conditions for survival. In Brazil, until 1950, the housing program was used by institutions as a manner of financial investment with a view to obtaining the highest possible profits, in a contentivist view of social welfare (Oliveira and Teixeira, 1989).

The trend of using welfare to develop society was similar in both Germany and Brazil, as reported by Costa (2005). For the author, the instable environment of the Brazilian inter-state system enabled Getúlio Vargas to implement a strategy of industrial planning in Brazil that was modeled on the plan Bismarck implemented in Germany: on the one hand, there was space for the state to construct a “national industry”, to the delight of the most influential agents, but on the other hand, it was possible to integrate and control workers in the industrialization project, thereby institutionalizing corporatism in bureaucratic requests.

Despite including numerous social benefits, according to Boschetti (2003), Germany was unable to institute a completely universal system of social security, with uniform payments for all citizens, excluding benefits for between 1% and 5% of the population. In Brazil, welfare policy was created in a very exact manner and consequently, it did not benefit the entire population. Oliveira and Teixeira (1989) stated that in 1923, only 22,991 workers were insured in Brazil, leaving a large part of the population uncovered by these social benefits, either because of a lack of employment, insufficient income, the impossibility of making prior contributions or distrust on behalf of workers in relation to the system.

Thereafter, social welfare began to be seen as a compensatory social policy in both Brazil and Germany. According to Medeiros (2001), after the consolidation phase, inaugurated by the military government in 1964, the welfare state model lost its populist character and followed two well-defined lines, one of which was compensatory, in which policies sought to minimize the impact of social inequalities, while the other was productionist, which involved social policies that sought to contribute to the process of economic growth. In Germany, this mainly occurred after the control of the national socialists in the 1940’s, when social policies were focused on redistribution to ensure a minimal existence, particularly for victims of war and persecution, as a form of compensation.

This compensatory social policy led to attempts to universalize rights and social benefits. This occurred earlier in Germany, in 1961, and was considered to be an improved democratic system (Ritter, 1991), given that it provided assistance to all citizens that were in a situation of risk (illness, pregnancy, disability, among others). In Brazil, this policy was made official in the Federal Constitution of 1988, which contained benevolent policies and extended welfare coverage. Ritter (1991) stated that this period corresponded to a tradition of the social state and demonstrated the importance of the relationship between capital and employment in the creation and development of society. In addition, it is important to note that during the dictatorship in Brazil, and the wars in Germany, particularly during the Nazi era and Hitler’s imperialism,

social policy was seen as a tool of power and control by governments, as well as a mechanism of loyalty to the party. Authoritarian regimes of the right have often used progressive social programs to undermine radical groups and to increase state control over society through paternalism, which was an essential tool in authoritarian politics (Malloy, 1979).

The first modern law related to social security was created by Bismarck in Germany, with an elitist and statist focus, similar to the evolution of Brazilian social security. During the Vargas period especially, progressive social programs were used to coopt and to increase the dependence of citizens in relation to the state, as well as to expand the regulations of the state. However, despite these similarities, according to Vianna (1998), the Brazilian welfare system began to distance itself from the German model with the modernization that led to the creation of the National Social Welfare Institute in 1966. Despite expanding the coverage of the population, like the German system had done, this Brazilian institution degraded associative schemes, imposing a logic based on greater privatization. Prior to 1964, although the beneficiaries were less in number and more stratified, there was evidence of citizenship, in terms of these people participating politically through leadership.

In Germany, social welfare policies were not meant to provide welfare for those who most needed it, but rather to help people who sought to get involved and who had national socialist beliefs (Alber, 1989). In Brazil, Costa (2005) considers that the military dictatorship centralized decisions within the institution, and the Cold War, with the threat of communism, made social policy become a platform for national development, associated with the doctrine of national security.

In Brazil, according to Malloy (1979), social welfare was seen as a method of ensuring that accumulated funds were converted into political power, either by channeling funds to individuals and favored groups or through favors related to the financing of politically-motivated housing projects. Furthermore, in order to gain certain rights in relation to these benefits, it was essential to have an intimate or direct connection with the state. Complaints were quashed by public authorities and, since welfare was one of the greatest sources of employment and it nourished the state bureaucratic machine, governments used it as a form of benefiting interest groups with significant positions.

Among the different aspects in which the formation of the German and Brazilian welfare systems were similar, one of the main factors to consider, and which characterizes the current systems, was the transformation from a capitalization system to a distribution system. In both Germany and Brazil, the welfare system was originally governed by the capitalization system. Due to the misappropriation of

social security funds for other uses, such as the financing of wars and the great depression in Germany, and the industrialization and development of Brazil, this system faced a crisis, leading to the creation of the distribution model, in which active workers finance inactive workers. According to Krause (1989), another problem that led to the end of the capitalization system in Germany was inflation, which consumed the social capital created by retirement insurance. This meant that the only possible way to maintain the services was through contributions, thereby making another step in the conversion to a distribution system. Börsch-Supan and Wilke (2003) emphasized that the distribution system was established when most of the fund was invested in government bonds between the two World Wars. Thus, in 1957, the government decided to convert the system gradually to a distribution scheme. The remaining social capital was spent almost ten years later. Thereafter, the German system was purely based on distribution, with a small reserve fund.

According to Thompson (2000), the debate about the effectiveness of financial schemes deals on the one hand with distribution welfare systems, which reduce aggregate national savings, and, on the other hand, with the capitalization system, which provides greater employment and may be capable of increasing national savings. According to Costa (2005), the World Bank believes that organized distribution public welfare systems may lead to imperfections in the economic system and disturb the growth of the country, given that there is no incentive to accumulate private funds, thereby avoiding the possibility of a country benefiting from possible gains in the capital market. However, Thompson (2000) stated that the distribution system involves less risk of alterations to benefits than capitalization schemes, given that the benefits of a distribution scheme are not sensitive to unpredictable economic developments, such as price changes and the rate of return on investments.

However, the distribution system is more sensitive to changes in the growth rate of the working population than capitalization schemes. On the other hand, Giambiagi (2000) highlighted that the distribution system makes the system more susceptible to oscillations in the economy, due to the absence of a financial reserve for temporal contingencies. Therefore, the two financial schemes involve controversial aspects, as well as positive and negative points, related to the specificity of the economic, demographic, political and social contexts that define the effectiveness of each scheme.

The two systems have specific differences, particular in terms of management. Börsch-Supan and Schnabel (1999) have shown that, unlike in Brazil, German retirement insurance is not part of the government's budget. If there is a surplus, social security contributions cannot be legally used to

decrease the government deficit. In 1994 in Brazil, the Voluntary Severance of Union Revenues (DRU) was created, moving 20% of revenues to other destinations that were not listed in the constitution. Social security was severely affected by these measures, since the budget was constantly decreased. According to Börsch-Supan and Wilke (2003), transfers can be made from the government to retirement insurance in Germany, but never the other way around.

From a comparative and historical perspective, the German welfare system has low administrative costs, excellent administrative councils and services for the insured, as well as a fast and efficient model (Issen, 1989). Germany also has a more centralized organizational structure (Vianna, 1998), which allows the Ministry of Employment and Social Assistance to supervise all retirement, health and pension plans, as well as insurance related to accidents in the workplace, unemployment benefits and family assistance.

Another factor that differentiates the two countries is the greater dedication that can be found in Germany to internal order, given that the old positioning which focused on external politics was undone by the Second World War. After 1945, the German people concentrated practically all of their efforts on rebuilding the country and improving their own welfare (Oertzen, 1982). The same author stated that the German case is different and atypical since there is a tradition of social welfare, dating back to Bismarck and surviving Nazism, which was in some way encouraged by conservative Christian democrats. This tradition has survived to the present day. According to Vianna (1998), the democratic social party was influential in the political scene, playing important roles and legitimizing decisions that were negotiated. In the case of Brazil, the priorities of the government were more focused on economic development and the industrialization of the country than social policies, as evidenced by the constant diversion of welfare resources to promote the economic development of the country.

Furthermore, according to Malloy (1979), there is one political factor that distinguished Brazil from European countries that made the direct transition from feudalism to modern capitalism. After the Brazilian declaration of independence in 1822, the country was governed by an empire dominated by a strong patrimonial, centralized state that was incapable of controlling the regional pressures that arose. New forms of capitalism were accepted as a form of generating wealth and maintaining regular and economic mechanisms for their own interests. Nevertheless, even today, Brazil still retains the remnants of a patrimonial, clientelistic and particularist model, preventing the stabilization and development of social policies that ensure a better quality of life for the population.

The social welfare systems of Germany and Brazil are based on the directives of social democracy

and state law, although they also exhibit the characteristics of a conservative and corporate state. However, there is a great difference between the corporatism found in both countries. Corporatist aspects in Brazil are reflected in a patrimonial state that joins the bureaucratic elite in controlling society through powerful groups, excluding the population from political decisions and reinforcing social stratification. In Germany, a phenomenon known as modern corporatism or “neo-corporatism” has been evidenced (VIANNA, 1998). This involves the articulation of several interests, with strong, active unions and formal organizations that are capable of representing the interest of different classes. Therefore, Germany is an example of a strong, corporatist structure with advanced welfare systems and full employment policies, which are strongly supported by the population. It is important to consider social participation when creating policies, given that it is essential for the consolidation of social policies that can attend to the needs of the population. As demonstrated by Vianna (1998), an aggregating society of various interests can be a successful recipe for maintaining the social welfare state.

Thus, the nature of the welfare state and the characteristics that have developed throughout its historical evolution enable particularism to prevail over general principles in Brazil. These characteristics have prevented the strengthening of labor movements that seek better living conditions, creating a paternalist structure, in which the state dictates the rules and concedes limited benefits, while the population accepts what they are told and conforms. Vianna (1998) added that the context in which Brazil is structured, with a presidential regime, conflicts between executive and legislative authorities, weak party structures, fragmented social representation entities, a low capacity of participation and a culture of privatism, hinders the adoption of neo-corporatist practices.

The most important question is whether the existence of these neo-corporatist structures or organizing workers enables the participation of the working and business classes, thereby contributing to the formation of a framework that is convenient and conducive to the development of a state that is focused on social protection. According to Vianna (1998), neo-corporatism favors the feasibility of democratic social parties and thus, reinforces the support of the welfare state. In this context, it is possible to state that Brazil is closer to a model in which interested parties make decisions on social policies and their interests come first, rather than a model of negotiated integration, which is predominant in Germany, with the formation of neo-corporatist groups (Vianna, 1998).

Another important aspect that has affected both the Brazilian and German contexts is concerns about the sustainability of the welfare system. The German government has made constant reforms in order to

ensure that their social security system can meet new demands that emerge and serve the new demographic structure of society. This trend reflects the thinking of Sund (1982), who has stated that the more humanely a social state adapts to the necessary structural modifications, the more it will be characterized as such. In Brazil, these reforms were necessary, mainly due to the dissemination of the Federal Constitution in 1988, which was characterized by benevolent policies and attempts to universalize coverage. For Boschetti (2003), Brazil mirrored its constitution more on English models than on the German social security system, which was created in the 1930's. This occurred due to its “shattered sympathetic character” (Cosa, 2005, p.7), with attempts to universalize benefits and extend coverage worsening the already poor financial welfare system.

Brazilian welfare system reforms occurred in 1998, 2003 and 2005, with a number of modifications in 2012, based on the following four pillars: decrease in expenses related to benefits; increase of retirement age; decrease of privileges for public servants and more recently; the partial migration to a capitalization system, with the creation of the Supplementary Pension Foundation for Federal Public Servants (Funpresp). In Germany, reforms occurred in 1992, 1999, 2001 and 2004, with a particular focus on the following: the introduction of actuarial adjustments for retirement benefits; an increase in the retirement age; an increase in equality between men and women in the job market and the concession of benefits; the expansion and encouragement of private welfare. According to Börsch-Supan and Wilke (2003), reforms in Germany have pushed for the partial substitution of distribution pension schemes with capitalization schemes, although this move is not obligatory.

This comparative historical perspective enabled us to design a chart that shows the similarities and differences between the two welfare systems. This historical diagnosis confirmed the main aspects that prevent the formation of a welfare system in Brazil that is more focused on the welfare needs of the population, based on a global reference model (the German welfare system). The elements that compose this chart refer to the following variables: the appearance of social welfare; the stance of the state; the objectives of social policies; the coverage of benefits; control and management; the structure of the welfare system; the intervention of the state and the corporate structure that, together, delineate the objectives of reforms and the main problems faced by these systems (Table 1)

Table 1: Variables for the comparative analysis of the welfare systems of Brazil and Germany

Components of the analysis	Germany	Brazil
Appearance of social welfare	<ul style="list-style-type: none"> <li>• Consequences of industrialization and urbanization (1881)</li> <li>• Workers claims and political struggles;</li> <li>• Exclusion and neglect of workers.</li> </ul>	<ul style="list-style-type: none"> <li>• Consequences of industrialization and urbanization;</li> <li>• Demonstrations and strikes (1917 and 1919);</li> <li>• Claims for labor legislation.</li> </ul>
Stance of the state in relation to social policies	<ul style="list-style-type: none"> <li>• Liberal</li> <li>• The state claimed that it would be impossible to satisfying workers claims as it would damage the independence and autonomy of free companies.</li> </ul>	<ul style="list-style-type: none"> <li>• Liberal</li> <li>• The state should only worry about internal and external security. Other issues should be borne by the free power of the market and society.</li> </ul>
Intervention of the state in labor issues	<ul style="list-style-type: none"> <li>• A manner of distancing the state from socialist ideas, calming the workers and promoting social order;</li> <li>• Intervention: Defensive integration (RITTER, 1991);</li> <li>• Bismarckian non-paternalistic stance</li> </ul>	<ul style="list-style-type: none"> <li>• A manner of controlling social movements as well as socialist and union trends, binding working relationships to the state.</li> <li>• Arthur Bernardes non-paternalistic stance</li> </ul>
Corporatist structure	<ul style="list-style-type: none"> <li>• Articulation of several interests, with the presence of strong and active unions, and formal organizations that represent the interests of different classes;</li> <li>• Strong corporate structure with advanced welfare systems, full employment and the strong support of the population.</li> </ul>	<ul style="list-style-type: none"> <li>• There are no visible perspectives of a neo-corporatist model of the articulation of interests on which agreements of social participation are based;</li> <li>• Paternalistic structure – the state makes the rules and concedes limited benefits, whereas the population merely has to accept and conform. Conflicts between executive and legislative authorities, weak party structure, fragmented social representation entities, low capacity for participation and a culture of privatism hinder neo-corporatist activities.</li> </ul>
Coverage of the benefits	<ul style="list-style-type: none"> <li>• Divided into professional classes;</li> <li>• Pioneers were sailors and merchants;</li> <li>• Exclusion of many professionals;</li> <li>• Slow trend to the universalization of benefits over time;</li> <li>• Social security more extensive in terms of beneficiaries.</li> </ul>	<ul style="list-style-type: none"> <li>• Divided into professional categories with their own CAPs;</li> <li>• Pioneers were sailors, railroad employees and merchants;</li> <li>• Exclusion of many professional categories;</li> <li>• Quick trend to universalization of benefits over time;</li> <li>• Social security less extensive in terms of beneficiaries;</li> </ul>
Management and control of welfare	<ul style="list-style-type: none"> <li>• In the beginning, this was done through contracts which were governed and administered by unions;</li> <li>• German retirement insurance does not constitute part of the government budget.</li> <li>• If there is a surplus, the social security contributions cannot be used to decrease the government deficit;</li> <li>• Transfers can be made from the government to the welfare fund but never in the opposite direction;</li> <li>• Centralized management.</li> </ul>	<ul style="list-style-type: none"> <li>• In the beginning, this was done through contracts which were governed by external agencies and the National Employment Council (CNT);</li> <li>• Creation of the DRU, which routed 20% of the Unions revenues (including social security) to other non-fixed destinations in the constitution;</li> <li>• Transfers can be made from the government to the welfare fund and vice-versa;</li> <li>• Decentralized management.</li> </ul>
Structure of the welfare system	<ul style="list-style-type: none"> <li>• Financed by employees and the Union – tripartite contribution system;</li> </ul>	<ul style="list-style-type: none"> <li>• Financed by employees, employees and the Union – tripartite contribution system;</li> <li>• Began with a capitalization regime and transformed into</li> </ul>

	<ul style="list-style-type: none"> <li>• Began with a capitalization regime and transformed into distribution;</li> <li>• Obligation of prior contribution is stronger;</li> <li>• Reduced redistributive character.</li> </ul>	<ul style="list-style-type: none"> <li>• distribution;</li> <li>• Obligation of prior contribution is weaker – rural workers;</li> <li>• More redistributive character.</li> </ul>
Objective of social service	<ul style="list-style-type: none"> <li>• Housing services: objective of social assistance and promotion of social equality;</li> <li>• Welfare: instrument of compensatory policy due to two wars and Nazi control. It was an instrument of power and control on behalf of governments and a mechanisms of loyalty to the party. .</li> </ul>	<ul style="list-style-type: none"> <li>• Housing services: objective of investment and financial reserve;</li> <li>• Welfare: instrument of compensatory policy due to the military dictatorship and a platform for the national development project, associated with the doctrine of national security.</li> </ul>
Objectives of the reforms	<ul style="list-style-type: none"> <li>• Introduction of actuarial adjustments for the benefits of retirement;</li> <li>• Increase of retirement age;</li> <li>• Increase in equality between men and women in the job market and in the concession of benefits;</li> <li>• Expansion and incentives for private welfare.</li> </ul>	<ul style="list-style-type: none"> <li>• Decrease expenses related to benefits;</li> <li>• Increase in the retirement age;</li> <li>• Decrease in privileges for public servants;</li> <li>• Partial migration to a system of capitalization and private insurance.</li> </ul>
Problems faced by welfare	<ul style="list-style-type: none"> <li>• Rapid aging of the population;</li> <li>• Lack of financial reserves to cover future retirees;</li> <li>• Increase of expenses without a proportional increase in revenues, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Slow aging of the population;</li> <li>• Lack of financial reserves to cover future retirees;</li> <li>• Increase of expenses without a proportional increase in revenues, etc.</li> <li>• Corruption, misappropriation and fraud.</li> </ul>

These variables are associated with elements that are crucial to the analysis of the social policies proposed by Esping-Andersen (1991), Vianna (1998) and Medeiros (2001), such as industrialization and urbanization, the role of the state, the coverage and scope of benefits, the bureaucratic structure, the political regime adopted and the mobilization of the working classes.

It appears therefore, that the historical evolution of the welfare policies of Germany and Brazil have a number of similarities, such as the fact that welfare appeared concomitantly with the process of industrialization, although this occurred later in Brazil, and a non-paternalistic stance on the conception of social security and labor policies, based on the ideas of Bismarck in Germany and Arthur Bernardes in Brazil. However, there are aspects that are different in both countries, such as the corporate structure. In Germany, the strong corporate structure favors the articulation of several interests among the social classes, culminating in a more complete and advanced welfare state that that of Brazil. Furthermore, social services in Germany, unlike in Brazil, were more focused on the promotion of equality and social welfare than on raising funds for economic development, as was the case in Brazil.

Given this patrimonial culture and the weak democratic structures in Brazil, neo-corporatist practices

have been compromised, ensuring that the evolution of Brazilian welfare distanced itself from the German model and has not achieved extensive social protection or dealt with changes in society. Social exclusion is less important than fiscal balance.

After the historical evolution of both Brazil and Germany in the last 100 years, it appears that their welfare structures are similar in terms of protection, as displayed in Figures 1 and 2.





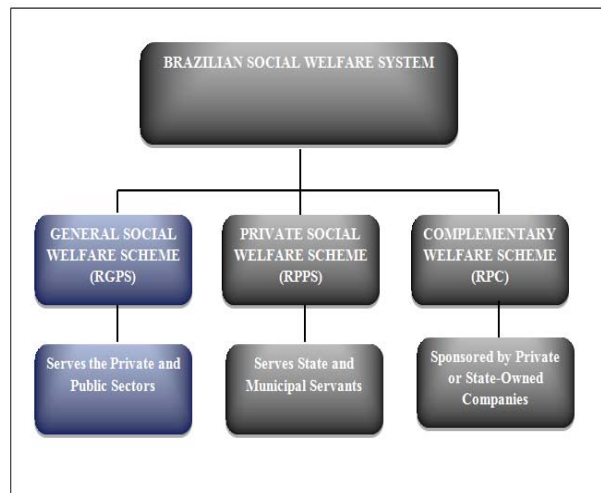


Figure 1: Structure of the Brazilian social welfare system.

As displayed in Figure 1, the Brazilian social welfare system involves the following schemes: the General Social Welfare Scheme (RGPS), which is associated with workers from the private sector, housekeepers, entrepreneurs, wage earners, public servants who did not move to the Congenial Scheme and state public servants. The second scheme is the

Congenial Scheme, which is associated with the federal military and involves a special retirement plan. Finally, there is the Complementary Social Security Scheme, which is made up of pension funds sponsored by private or state companies (closed pension fund) and by entities that are open to the scheme.

Adapted from SPARP LAN. (2014) *Struktur der Altersvorsorge*. Recovered on March 25, 2014 from <http://www.sparplan.de/altersvorsorge/3-schichten-modell/>

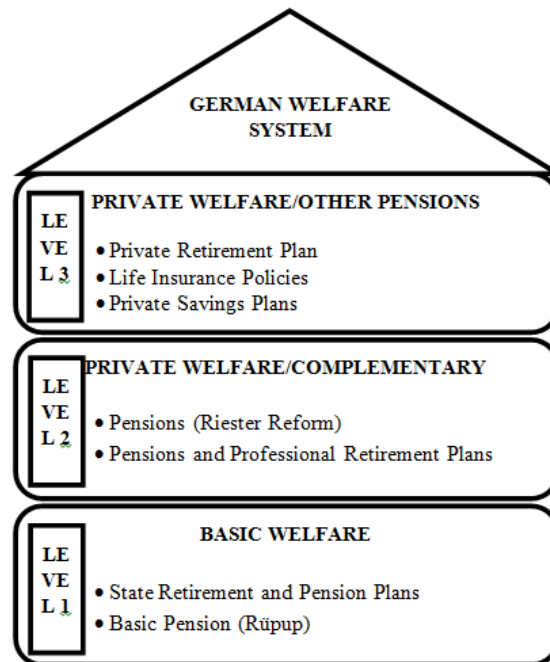


Figure 2: Structure of the German social welfare system.

Since the 2005 reform in Germany, the German welfare system has been structured around three pillars or levels, as displayed in Figure 2. The three levels are Basic Social Security, Complementary Social Security and Private Social Security. Basic welfare, which constitutes the basis of the system, is formed by a legal regime of pensions, professional pension plans from the

private, rural and public sectors, as well as pensions financed by contributions (paid by employers and employees, equally) based on individual gross earnings, up to a contribution limit, due to the expenses of the federal budget, which are known as Rüppup pensions (Schmähl, 2002).

The second level involves pensions and retirement plans governed by the capitalization system, which were created after the Riestler reform, part of which is subsidized by the state and which serves as a compliment to the basic system. The third level deals with private insurance products, such as retirement plans, life insurance and savings plans. There is no state support at this level. The contributions are paid by the beneficiaries themselves and governed by the capitalization system.

Thus, it appears that the welfare systems that formed in Germany and in Brazil are similar in terms of the division between the form of financing and the support of the state in the provision of benefits. After constant reforms, both systems have attained a mixed financing regime which seeks to minimize the impact caused by changes in society.

### III. FINAL CONSIDERATIONS

Although the social, economic and political contexts of Brazil and Germany are different, and considering that Germany has reached a more mature stage in relation to the development of society, both countries exhibit similar contexts in terms of the development of social welfare and its evolution over time. Nowadays, there are many similarities between the two welfare systems, including the distribution system, tripartite financing and the need for prior contributions for the concession of benefits, among others. In addition, structural and economic transformations have marked the context of the two countries, such as the aging of the population (faster in Germany, in that the proportion of elderly to active adults is greater than in Brazil), the lack of financial reserves to cover future retirees and the increase of expenses, without a proportional increase in revenues, among other aspects. However, there are several problems that compromise the financial welfare system to a greater degree in Brazil than in Germany, such as cases of corruption, fraud and misappropriation, which lead to an imbalance in the financial system. In general, it appears that the German social state is much stronger than the Brazilian state and has been developed based on the ideals of assisting the poor and the transformation into a state of social aid. For these reasons, it is seen as a model by developing countries, such as Brazil.

One of the main points to be observed in relation to the historical evolution of the welfare policies in the two countries is that unlike in Germany, the Brazilian institutional political format did not provide for the participation and inclusion of social protagonists in the decision-making process and in the formation of policies. This is clear in the early stages of the creation of these welfare systems, which gained strength through different types of labor movements in both countries, and in the neo-corporatist structure that molded the

interests of employers, employees and the state, as well as their articulation with public authorities.

In Brazil, elements of neo-corporatism did not come into effect in terms of social policies, considering the creation of organizations that represent the population that are incorporated in the adoption and execution processes of government political decisions. There was a predominance of aspects linked to the dominant classes and a low level of participation by organizations that represented the interests of the social classes, such as workers and employers. Thus, it was impossible to extend the scope of negotiations to include the general population.

The Brazilian welfare system was created in the 1920's, following the Bismarckian model, and was reformed in 1988 based on Beveridgean universalist and egalitarian principles. The manner in which welfare policies were molded over the years was in line with the capacity of the country to organize itself politically and economically, as well as the nature of the state and how it intervened in society to serve social demands. Brazilian culture was more focused on individualism and exhibited a more liberal and particularistic stance in the creation of welfare policies, resulting in an unequal, selective and consequently, exclusive system. Meanwhile in Germany, due to the wars in Europe, there was a more intense feeling of solidarity, culminating in values such as equity, justice and distributivity when dealing with social issues. This meant that welfare, despite being less redistributive, was able to serve the demands of the population and promote welfare in a broader manner than in Brazil.

More recently, it has become clear that the changes in the two welfare systems, caused by demographic factors such as the aging of the population, decreases in birth rates and increased life expectancy, as well as economic factors such as the replacement of workers by machines, reflect strategies to preserve the welfare of the state in the face of fiscal deficits, as well as industrial and organizational reorganization. This process is being carried out through reforms that seek to promote actuarial adjustments, increase the retirement age, reduce expenses related to benefits, and encourage private social insurance models in order to minimize the problems caused by these changes.

In conclusion, although the Brazilian welfare system was inspired by many aspects of the Bismarckian model, it has moved away from those ideals, particularly in terms of not incorporating social protagonists in the creation of policies (as is the case in Germany) and not serving the needs of all social classes. In Brazil, the strongest groups in the state structure predominate in the organization of political parties.

In addition, Brazil has distanced itself from its parent model by creating an unequal structure of

protection, as well as hierarchical beneficiaries, throughout its historical evolution. These beneficiaries are hostages to corporate interests that are imposed through political pressure. This is combined with a passive population and a lack of vindicatory action to improve the existing system. Therefore, unlike Germany, Brazil has established a complementary relationship between the public and private sectors, which does not seek to overcome the weaknesses of the public system and increase coverage, but rather reinforces once more the logic of "exclusive universalization". This means that citizens with equal rights according to the law are excluded from the process of the concession of rights and the formation of these social policies.

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# Life after Life: An Assessment of Elderly Institutional Care in Addis Ababa City (in Particular Reference to Mekedonia Home for the Elderly and Mentally Disabled)

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**Abstract-** Given the economic advancements and well-being leading people to live longer, older people living in developing nations particularly in Africa are suffering from multi-faceted problems. One of the possible interventions to curb the suffering of the elderly population is an institutional caring system. This intervention is of paramount importance in time of crises like family lose, health complication and poverty driven street life. Today in Ethiopia, it is becoming a day to day scene to see numerous elders begging in the streets for their living. Although it is in a limited effort and way, there are institutional care schemes in Ethiopia (Segniwork, 2014). This study tries to assess the institutional care provided for the elderly and residents perception of the quality of care provided by Mekedonia Home for the Elderly and Mentally Disabled. The study used mixed-method approach (a concurrent nested strategy). The survey which was employed in this study was focused on gathering information on the types of care, levels of care and the residents' perception of the quality of care provided. In-addition, in-depth interviews and FGDs( Focus Group Discussions) were conducted with purposively selected residents and key informant interview with key administrative staffs who were in charge of providing care and support, focusing on the available resources and problems associated with care and support.

**Keywords:** *elderly, institutional care, residents.*

**GJHSS-C Classification:** *FOR Code: 370199*



L I F E A F T E R L I F E A N A S S E S M E N T O F E L D E R L Y I N S T I T U T I O N A L C A R E I N A D D I S A B A B A C I T Y I N P A R T I C U L A R R E F E R E N C E T O M E K E D O N I A H O M E F O R T H E E L D E R L Y A N D M E N T A L L Y D I S A B L E D

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**Abstract-** Given the economic advancements and well-being leading people to live longer, older people living in developing nations particularly in Africa are suffering from multi-faceted problems. One of the possible interventions to curb the suffering of the elderly population is an institutional caring system. This intervention is of paramount importance in time of crises like family lose, health complication and poverty driven street life. Today in Ethiopia, it is becoming a day to day scene to see numerous elders begging in the streets for their living. Although it is in a limited effort and way, there are institutional care schemes in Ethiopia (Segniwork, 2014). This study tries to assess the institutional care provided for the elderly and residents perception of the quality of care provided by Mekedonia Home for the Elderly and Mentally Disabled. The study used mixed-method approach (a concurrent nested strategy). The survey which was employed in this study was focused on gathering information on the types of care, levels of care and the residents' perception of the quality of care provided. In-addition, in-depth interviews and FGDs( Focus Group Discussions) were conducted with purposively selected residents and key informant interview with key administrative staffs who were in charge of providing care and support, focusing on the available resources and problems associated with care and support. The findings of the study revealed that there are food, clothing, shelter, recreational and health care services that are actually provided by the institution and most sample residents had ranked each service provision as good and excellent. The study also revealed that providing basic services to the neediest elders is the foundation goals of the institutions. And also understands that the service provision has changed the life situation of the resident elders. One of the possible interventions to curb the problems of vulnerable populations (such as elderlies, children and women's) is an institutional care system. This intervention is of paramount importance in time of crises like family lose, health complication and poverty driven street-life.

*Keywords:* elderly, institutional care, residents.

## 1. INTRODUCTION

Most elderly prefer to remain in their homes where they are able to maintain the integrity of their social network, preserve environmental landmarks and enjoy a higher quality of life. However, due to complex socio-economic and political

circumstances elderly people lose their independent livings (Luppa& Tobias,2009).

Nowadays, elderly people are encountered with various problems this is due to limited government social welfare schemes, weakening of traditional family and community support. Thus it is common to see elderly who have the knowledge and skill to help not only themselves but others facing serious problems and resorting to begging and sleeping on streets (Ministry of Labor and Social Affairs, 2006, p4).

In Ethiopia, elderly people make up a relatively small portion (2.8%) of the total population, and traditionally their main source of support has been the household and family, supplemented in many cases by other informal mechanisms, such as kinship networks and mutual aid societies (Ministry of Labor and Social Affairs, 2006, p4).

Currently, at the national level, government and non-government organizations as well as association of retired persons have started to make greater efforts in tackling problems of the elderly. One of the solution, as the elderly became in such a condition, is the development of institutions to care for them (Adamek & Alemnesh, 2014). These elderly care institutions which are private or humanitarian, voluntary and charity associations suchas Mekedonia Home for the Elderly and Mentally Disabled, are assumed to be significant to increase the quality of life of the elderly with good quality of care.

Mekedonia Home for the Elderly and Mentally Disabled (MHEMD) is an indigenous non-governmental, non-profit charity organization, founded on 7<sup>th</sup> January 2010. The purpose of the institution is to support elderly people and people with disabilities who otherwise have no means of survival by providing them with shelter, clothing, food, and other basic services.

Mekedonia is a residential home care unit that is more than just a provider of support; it is also the permanent dwelling place of residents. It has the potential, therefore, to influence and affect many aspects of the residents' daily lives beyond health and functional ability. It is important, therefore, that researchers, policy-makers and other interested parties

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recognize and understand the important elements that constitute a good quality of care in elderly home care in order to put in place mechanisms that will ensure that this objective is achieved.

It is in this regard that this study attempts to assess the types of care being provided by Mekedonia and residents' rating of the actual care provided, taking the institution and the elderly care recipients as a frame of study.

## II. MATERIALS AND METHODS

### a) Research Design

The general principle of research design is that the research strategy or strategies, and the methods or techniques employed must be appropriate for the questions made by the researcher wants to answer (Robson, 1993:39). This study employed, cross-sectional survey design so as to obtain information about the present situation which is related to the issue under study. Data's were collected at one point in time from a randomly selected samples of the population. However, the cross sectional survey design was made to approximate longitudinal survey design, as questionnaire elements that refer to the past were included. That is, while the cross-sectional survey is used to obtain data regarding the service and supports delivered to residents and the benefits obtained from the participation, the approximating longitudinal survey is used to provide data relevant to their past situations.

### b) Methods of Data Collection

This study, utilized both quantitative and qualitative methods of data collection and analysis to obtain the strengths from both methods and to address their weakness by using strengths from each other. It employed methodological triangulation of various methods of data collection and analysis in order to assure the validity and reliability of research results, and to effectively address different objectives of the research. While survey questionnaire was utilized as technique of collecting quantitative data, the qualitative was collected using interview, FGD and observation.

### c) Sampling Technique

For the purpose of achieving the objectives of the study, stratified random sampling techniques were used to select sample residents. Stratified sampling is a sampling design in which separate samples are drawn from different segments of a population in order to ensure the proportionate representation of each of the segments in the overall sample (Yeraswork, 2010, p135).

For instance, this study was undertaken on the elderly & disabled population of institutional care. Thus, disability status and sex are very important variables and along these two variables thereby it was possible to employ stratified sampling technique which can nearly

reduce the sampling error to zero (Yeraswork, 2010, p135).

Sampling was conducted as follows: Firstly, the population was partitioned into homogenous subsets i.e. the sampling frame (the roster) was divided between that which contains the names of (males and females), (residents with physical disability and the physical ability), and then appropriate random samples were drawn from each of the subsets.

Likewise, according to the statistical figures of the institution, from the total residents of 850, 320 of them were mentally disabled hence, they were thought as they provide less information for the study; they are removed from the sampling frame. Out of the remaining 530 residents, with 95 % confidence interval and by 5% sample size proportionate, a total of 175 sample residents (using the online sample size calculator) were estimated. The selection process was conducted through random numbers generator in SPSS Version 20) from each of the sampling categories (i.e. sex and disability status). To do so, a list of residents' (sample frame) was obtained from the institutions administrative office.

In summary, from each of stratifying categories of physically-abled male residents (N=213), physically-disabled male residents (N=198), and physically abled female residents (N=72) and 47 physically disable female residents, 53, 54, 37, & 29 sample residents were randomly selected from respective populations by using SPSS.

## III. RESULTS AND DISCUSSION

This section presents the actual care provisions of Mekedonia and it explains the types and levels of service provisions as it is leveled by the residents themselves. The presentation below summarizes the types and levels of care provided:

### a) Actual care and support provision

Different services are provided to residents in Mekedonia. The main services provided for the admitted elders, includes; Shelter/bed rooms/, food, health care service, hygiene facilities, assisted caring, clothing and funeral ceremonies when they died. The other supporting services though it is not well enough as it was indicated by the coordinator includes, recreational facilities such as, TV room facility (four in four meeting halls), and indoor games.

The table below indicates the number of physically disabled respondents who have been provided with aid equipment and are actually using the provided aid equipment. Likewise, all sample respondents were asked to mention the type of aid equipment's they use in the institution. Accordingly, ramps comes first with 48 frequencies, followed by walking aid equipment with frequencies of 45 and handrails with a frequencies of 17 respectively. The smallest use of aid equipment wasramps and electric wheelchairs with a frequencies of 2 and 3 respectively.

**Table-1:** Frequency and percentage distribution of physically impaired respondents who commonly use aid equipment at Mekedonia

Use of aid equipment	Yes	No	Total
Walking aid equipment	45 (25.7)	130 (74.3)	175(100)
Manual wheelchair	48 (27.4)	127 (72.6)	175(100)
Electric wheelchair	3 (1.7)	172 (98.3)	175(100)
Handrails along corridors	17 (9.7)	158 (90.3)	175(100)
Ramps	2 (1.1)	173 (98.9)	175(100)
Special eating utensils	11 (6.3)	164 (93.7)	175(100)
Special writing utensils	7 (4)	168 (96)	175(100)

Source: Researcher's survey data (2016)

Institutional care has the potential to influence residents' lives either positively or negatively on outcomes that include more than just health. It shapes where elderly live, how they live, whom they see, what they do, and the relationships transpiring within families and communities (Kane, 2001). Therefore it is very important to study the availability of entertainment

facilities at Mekedonia, so that it is possible to understand how residents are engaged in meaningful and entertaining activities. Respondents were asked about, whether there has been any entertaining programs which were produced and organized by Mekedonia and if they are entertained.

**Table 3:** Frequency and percentage distribution of respondents' by every entertaining program provided by Mekedonia

Variable		No.	%
Was there any entertaining program provided by Mekedonia?	Yes	132	75.4
	No	43	24.6
Total		175	100.0

Source: Researchers' survey data (2016)

As it is seen in the above table (table 3), most of the sample respondents' i.e. 75.4% has mentioned as there was entertaining programs produced by Mekedonia. Whereas, 24.6% of the samples has replied as there was no entertaining programs provided by Mekedonia.

Accordingly, television comes first with 175 frequencies, followed by Video or DVD with frequencies of 140 and Newspapers and magazine with a frequencies if 136 respectively.

It is summarized in the following table below:

Sample respondents were also asked about the availability of entertainment facilities at Mekedonia.

**Table 4:** Frequency and percentage distribution of Communal recreational facilities at Macedonia

Television	175(100)	0	175 (100)
Newspapers or magazine	136 (77.7)	39 (22.3)	175 (100)
Library or book lending service	15 (8.6)	160 (91.4)	175 (100)
Video or DVD	140 (80)	35 (20)	175 (100)
Indoor games	121 (69.1)	54 (30.9)	175 (100)
Musical instruments	11 (6.3)	164 (93.7)	175 (100)
Coffee or tea making facilities	1 (0.6)	174 (99.4)	175 (100)

a) Residents rating of the available services

Table 5: Residents rating of the available services provided at Macedonia (N=175)

Actual care provision at Mekedonia	Level of care	Frequency	Percentage
Provision of food service	Poor	12	6.9
	Fair	4	2.3
	Good	95	54.3
	Excellent	64	36.6
	Total	175	100
Provision of clothes	Poor	1	0.6
	Fair	31	17.7
	Good	85	48.6
	Excellent	58	33.1
	Total	175	100
Provision of health care service	Poor	4	2.3
	Fair	8	4.6
	Good	71	40.6
	Excellent	79	45.1
	Total	162	92.6
Availability of adequate bed rooms	Poor	52	29.1
	Fair	55	31.4
	Good	47	26.9
	Excellent	21	12
	Total	175	100
Availability of adequate bath rooms	Poor	53	30.3
	Fair	61	34.9
	Good	39	22.3
	Excellent	22	12.6
	Total	175	100

Source: Researcher's survey data (2016)

All sample residents were asked if they believe that there is adequate food service at Mekedonia. And out of the total 175 sample residents, 163(93.1%) of the samples believe that there is adequate food service, whereas, the remaining 12(6.9%) believe that there is no adequate food service at Mekedonia. Furthermore, respondents were asked to rate the available food service at Mekedonia.

As shown in the table above, all respondents were asked to rate the level of food service despite their differential outlook about the presence of adequate food service at Mekedonia. Likewise, 54.3% of sample respondents' had rated the food service as good, 36.6% has rated the food service as excellent, whereas, 6.9 and 2.3 percent has rated the food service as poor and fair respectively. Therefore, from the above data it is possible to conclude that respondents' had a positive outlook for the food service at Mekedonia.

Respondents' were asked whether the institution provide them clothes. Likewise, all the respondents' 175(100%) has replied as they are provided with clothes. In addition, respondents were asked whether the provided clothes fulfill their interests (i.e. residents were asked if the provided clothes are distributed based on their needs).

As such, all sample respondents were asked to rate the clothing service at the institution. Most of the

sample respondents', 48.6% has rated the clothing service as good, 33.1% of the samples has rated as excellent, whereas, 17.7% has rated as fair and only one or 0.6% of the sample respondents' has rated the clothing service as poor. Moreover from the above data it is possible to conclude that, even though residents are not interested with the clothes they are receiving but, they have a positive outlook for the clothing service.

The researcher was also interested to know whether the provided clothes fulfill the interest of residents (i.e. residents were asked if the provided clothes were distributed based on their needs). Thus, it is 41.7% of the total sample respondents' that are interested in the provided clothes, whereas, 58.3% of the sample respondents' replied as they are not interested in the given clothes. Accordingly, from the above data we can understand that though all of the residents are benefited from the provided clothes but there is disparity in terms of their specific needs for the provided clothes. Hence the clothes are acquired from volunteer personalities it might not fulfill their specific needs. As such, most of them are not interested with the provided clothes.

Mekedonia is serving residents in four compounds, one owned and three rented compounds. The bed rooms inhibit between eight and forty (in temporary shelters) residents. There are bed rooms



constructed with metal sheets used as temporary residences to receive the needy elders whose admission couldn't be delayed until the construction of regular residence. Beds in Mekedonia are double stairs. Elders are assigned to the ground bed and younger elders are assigned to sleep on the upstairs beds. As it is indicated in the table above, all sample residents were asked if they believe that there is adequate bed rooms at Mekedonia. And out of the total 175 sample respondents 118 samples (67.4%) believe that there is no adequate bed room at Mekedonia whereas, the remaining 57(32.6%) of the samples believe that there is adequate bed rooms.

Furthermore, respondents were also asked to rate the available bed rooms. Despite respondents' differential response about the adequacy of bed rooms, all sample respondents were asked to rate the available bed rooms. Likewise, 31.4% of sample respondents' had rated the available bed rooms as fair, 29.7% has rated as poor, whereas, 26.9 and 12 percent has rated the available bed rooms as good and excellent respectively. Therefore, from this data, it is possible to conclude that residents had unfavorable outlook for the existing bed rooms this is because most of them believed that there is no adequate bed rooms and the existing bed rooms lack quality.

This study had also tried to find out residents past sleeping circumstances, in order to have a clear understanding of their present outlooks of the service they are receiving. In doing so all sample respondents were asked, how they use to sleep before they were admitted in to Mekedonia. Most of the respondents i.e. 66.3% replied that they were sleeping alone and the remaining 33.7% had replied as they use to sleep together with others and most of the respondents' that is 68% use to sleep anywhere in the street whereas, few of them i.e. 2 (1.1%) of the respondents use to sleep with grandchild or children.

It's important to combine and discuss about the respondents' past and present sleeping situation in order to come up with a clear understanding of the resident's rating of the available bed rooms at Mekedonia. As it is indicated in table, 31.9 and 29.7 percent of the respondents has leveled the situation of bed rooms at Mekedonia as fair and poor respectively which is more or less unfavorable outlook. Whereas, majority of i.e. 68 and 12 percent of the respondents has replied as they were living on the streets and in church yards respectively which is nearly 80 percent. Therefore, from this data, in particular and from the two data's in general, it is possible to conclude that even though, residents had come up from the worse sleeping situation still the existing sleeping rooms are not adequate and the situation of the bed rooms are uncomfortable for residents as it is expected to be.

The other service provided by Mekedonia was bath room and all sample residents were asked if they

believe that there is adequate bath rooms at Mekedonia. Out of the total 175 sample respondents 100 samples (57.1%) has believed that there is no adequate bath room at Mekedonia. Whereas, the remaining 75(42.9%) of the samples has believed that there is adequate bath rooms. Furthermore, respondents were also asked to rate the available bath rooms.

As it is visible in the above given data, all sample respondents were asked to rate the available bath room facility regardless of their differential outlook about the adequacy of the bath rooms. Likewise, 34.9% of sample respondents' had rated the available bath rooms as fair, 30.3% has rated as poor. It is, 22.3 and 12.6 percent of the sample respondents who has rated the available bath rooms as good and excellent respectively. Therefore, from this data, it is possible to conclude that residents had unfavorable outlook for the existing bath rooms, this is because most of them (57.1%) believe that there is no adequate bath rooms and the existing bath rooms lack quality which is nearly 65.2%.

Maintaining a good health and access to health care is a core concern of elderly people everywhere. As literatures indicate, the growing number of elderly persons is accompanied by mental illnesses and health problems that need even long term care and support system. Regarding the health care service at Mekedonia, all sample respondents' were asked if Mekedonia is having a health care service or if it has a health post or a clinic and if they have been benefited from it. Accordingly, all of the sample respondents' know that Mekedonia has a clinic. And it is 162(92.6%) of the sample respondents' who has replied as they have been benefited from the available clinic. Whereas, it is only 13(7.4%) of the sample respondents' has replied as they have never used the available clinic at Mekedonia.

Furthermore, those 162 (92.6%) of the sample respondents' who had been benefited from the available clinic, were asked to rate the available health care service. As it can be seen from the data, 92.6% of the respondents' have been treated or benefited from the available health care service. Whereas, 7.4% of the respondents' has never been benefited. Consequently, out of 92.6% of sample respondents, who has been benefited from it, 48.8% of the sample respondents' has rated the available health care service as, it is excellent, 43.8% of the sample respondents' has rated as it is good. Whereas, 4.9% rated as it is good and only four or 2.5% of the sample respondents' has mentioned as it is poor. Moreover, from the data provided we can conclude that, most of the residents are more satisfied by the health care service provided by Mekedonia.

Also as the information gained from in depth interview, there is referral system for the patients in need of extra medications, the patient will get referred to other government hospitals like Zewditu, Menelik II,

TekurAnbessa, Zenebework, Yekatit 12, and St. Paulos. The institution has special agreement with these hospitals. Volunteer medical doctors will also come to the clinic on Tuesday, Thursday and Sunday and give services to those who need medication. Saturday morning psychiatrists came to the clinic and give psychological services to mentally ill care recipients.

One of the health care givers has explained that most of the care recipients have poor health and usually visit the clinic. Some other nurses has also added, as causes of frequent health problems are age related.

It was also revealed that most of the older persons are facing sight, mobility and hearing problems, some of them gastritis and others suffered mental illness. These illnesses were treated by the medium clinic in the institution and by the referral hospitals.

#### IV. CONCLUSION AND RECOMMENDATIONS

##### a) Conclusion

With a growing pressure from destitute aging population on social & health care use and expenditure, it is very important to systematically assess the nature and quality of institutional based care for the elderly, and discover the effects of institutional living upon elder people themselves in order to find out whether institutions for the elders were necessary in our society, and if so what form they should take.

From the study findings, it is possible to draw a definite conclusion that institution based care and support service which focuses on the needy elders have rescued the late life situations of the elders. While the most detailed study is required to understand the quality of care and living condition, it is possible to conclude that the service of the institution has changed the life situation of the elders.

The residents, despite having been forgotten by the society to live in the streets for long period of time, driven out of their families, and living helplessly were found enjoying their institutional life. The findings of the survey have indicated that, residents are made to receive services such as shelter, food, clothes and health care services. They spent their spare time by playing card games, chatting with friends, watching T.V and having discussions among themselves. Except with some problems associated to care such as; inadequate bathe and bed rooms and communal recreational facilities, decreased care givers attention on the process of care giving activity, insufficient physical space for residents to care for and living together with mentally disabled patients, most beneficiaries expressed their opinion that they are living a better life than their living arrangement before admission.

In developed countries it is considered that old age homes as the last resort and staying there as equivalent to being thrown in a dustbin. But, that was not true in the case with the residents of these old age

home. They were not discomforted with their stay rather; they were enjoying their communal living. As a result, of institutional living they are able to enjoy and connect to the community regardless of gender, class, and religious differences.

##### b) Recommendation

- Institutional care recipients, especially those who are suffering from frailty want to be addressed in a polite, friendly and appropriate manner and treated with respect for their personal privacy, hygiene and appearance, choice of clothes and furnishings and access to appropriate care and assistance with eating, drinking, washing, toilet and other daily activities are required.
- As institutional elders are the most segregated and forgotten segment of the society, it is an ideal practice area where professional values and practice principles are applied in real life.
- Multiples of practice tasks are vacant waiting for the attention of professionals, practitioners and advocates. Caring, counseling, training, advocating and institutional management are all needs the involvement of gerontologists, sociologists, social work practitioners and other professionals.
- In addition to recognizing elders as one important part of the society, expanding policies and programs that can address better institutional care and community support, the social care of elders, housing, and service access needs of older people is required.

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## Redefining Success: Role and Scope of Social Work

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*Abstract-* In the contemporary times, the world is confronted with sad stories of crime, violence, wars, disasters, abuses and exploitation. Hatred, fear and tension have taken over compassion, love and peace. In this context, very progress and development achieved by human civilization seems futile. The present paper analyzes the real meaning of success in contrast to the popular notion which is measured in terms of materialistic possessions. Using relevant secondary data, the paper argues that the 'developed' nations though rank higher on indicators like per capita income and Gross National Products, these countries severely lag behind on parameters of happiness, satisfaction and well-being. In juxtaposition, poor countries like Mexico and Nigeria are more peaceful with strong community ties and interdependent living, despite lacking affluence. Research work has shown that congruent social relations are far more potent variables than wealth in ensuring happiness and well-being.

Social work is one of the prominent human service professions that have been unflinchingly working to bring amiability and well-being in the society, and it has a crucial role in redefining and propagating the meaning of 'success', which is holistic and balanced encompassing healthy body, mind and social relations. The paper provides existing and suggestive interventions of social work profession to contribute towards establishing a vibrant and enriched society, where success means peace, happiness, compassion and wellbeing.

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# Redefining Success: Role and Scope of Social Work

Dr. Archana Kaushik <sup>α</sup> & Ms. Shashi Rani Dev <sup>σ</sup>

**Abstract-** In the contemporary times, the world is confronted with sad stories of crime, violence, wars, disasters, abuses and exploitation. Hatred, fear and tension have taken over compassion, love and peace. In this context, very progress and development achieved by human civilization seems futile. The present paper analyzes the real meaning of success in contrast to the popular notion which is measured in terms of materialistic possessions. Using relevant secondary data, the paper argues that the 'developed' nations though rank higher on indicators like per capita income and Gross National Products, these countries severely lag behind on parameters of happiness, satisfaction and well-being. In juxtaposition, poor countries like Mexico and Nigeria are more peaceful with strong community ties and interdependent living, despite lacking affluence. Research work has shown that congruent social relations are far more potent variables than wealth in ensuring happiness and well-being.

Social work is one of the prominent human service professions that have been unflinchingly working to bring amiability and well-being in the society, and it has a crucial role in redefining and propagating the meaning of 'success', which is holistic and balanced encompassing healthy body, mind and social relations. The paper provides existing and suggestive interventions of social work profession to contribute towards establishing a vibrant and enriched society, where success means peace, happiness, compassion and well-being.

## I. INTRODUCTION

Human species has practically ruled over the planet Earth. From a life of hunter-gatherer, humans have now stepped on the Moon and trying to demystify the components of galaxies. Today, we possess all the sophisticated machinery and technology to make our life comfortable and full of luxuries. Life is much easier these days than it was hundred years ago because of scientific and technological advancements. We can communicate with our fellow-beings sitting miles away within seconds with telephones, mobiles, emails, Skype, and other modes. We can travel much faster and in greater ease with airplanes and high speed trains. Modern entertainment systems also let us have more fun and recreational engagements. Moreover, in the last few decades, innovations in medical sciences and better public health system, world over, have amplified life expectancy. According to the World Health Statistics (2014), people everywhere are living longer. Based on global averages, a girl who was born in 2012 can expect to live to around

73 years, and a boy to the age of 68. This is six years longer than the average global life expectancy for a child born in 1990 (WHO, 2014). There are 131.4 million births every year in contrast to 55.3 million deaths each year (World Fact Book, 2011). Apparently, we have made progress in leaps and bounds in economic growth and development. Science and technology have contributed immensely to our material comforts and overall living.

However, despite material success, progress and development, somewhere we have terribly failed in bringing about peace, or in reducing pains and sufferings. Daily, in one part of the world or the other incidences of violence, wars and disasters erupt claiming human lives and causing much agony and grief. The World Health Organization (2002) observes that violence causes more than 1.6 million deaths worldwide every year, making it one of the leading causes of death in all parts of the world for persons aged 15 to 44 years. With 191 million people losing their lives in conflicts and violence in the 20<sup>th</sup> century, it has become one of the most violent periods in human history. And, well over half of them were civilians, notes the WHO (2002). Moreover, the United Nations (2015) asserts that 35 percent of women worldwide, reportedly, had experienced violence in their lifetime, whether physical, sexual, or both; one in 10 girls under the age of 18 was forced to have sex.

Further, terrorism is on the rise, with an almost fivefold increase in fatalities since 9/11 (Global Terrorism Index, 2014). In the year 2013 there was 61% rise in the number of people killed in terrorist attacks. In addition, World Report on Violence and Health brings out that in the year 2000, an estimated 1.6 million people in the world lost their lives to violence (WHO, 2002). Quite interestingly, Institute for Economics and Peace (2012) calculates that if financial resources spent on violence containment are represented as a discrete industry, it would be the largest industry in the U.S. economy—larger than construction, real estate, professional services, or manufacturing and it would be the seventh largest economy in the world, only slightly smaller than the UK economy.

Everyday newspapers and news channels show the same sad stories of violence, wars and disasters. It is clear that in modern times ecology – nature and life on the planet Earth – is not safe. This instills an awareness of fear and tension that any sensitive and

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compassionate being must question the 'success and progress' we have made in our modern world.

Can we really consider the rise in human life expectancy and sharp decline in death rate as the triumph of human civilization, if there are ample evidences of genocide, violence and exploitation in almost every part of the world? It is ironical that a person suffering from tuberculosis can surely be cured to live a long and healthy life but it cannot be guaranteed that a healthy person going to workplace would not be killed by terrorists or communal/ethnic violence; a woman can receive best of ante natal care but may not be protected against sexual violence. And such instances of violence and insecurity to human life are seen, apparently, in industrially advanced societies, where unprecedented 'development' only seems to have fostered restlessness and discontent. Then the question arises – is this the success and progress and development?

What is the meaning of success? In a common parlance, success is measured by materialist possessions and position in the society where one can influence lives of others. More often than not, big houses, luxury cars, fat bank balance, and other items showing aristocracy are considered the indicators of success in the society. At an individual level, a person with plenty of money and materialistic possessions is considered 'successful', irrespective of the means to achieve the same or his/her state of happiness or misery. Do these materialistic possessions actually give us happiness and contentment?

Looking at the macro level paradigm, nations have been categorized into 'developed' and 'developing' countries based on certain socio-economic indicators. In this regard, Gross Domestic Product and per capita income become the indicators of being rich and successful societies. And happiness – it is taken as fallout of being successful.

#### a) *Measuring success*

How much does material prosperity contribute to happiness? Hypothetically, the richest countries like United States of America, most European countries, Australia, Canada, should be having the happiest people. However, the results are paradoxical. The New Scientist magazine from Britain (2003) conducted a survey in 65 nations to rank the happiness. And the survey found that the world's happiest countries with the most satisfied people are Puerto Rico and Mexico, and those with the most optimistic people are Nigeria and Mexico. And the most powerful and richest nation the USA is embarrassingly ranked 16<sup>th</sup> on the list.

Interestingly, the results of the survey defy the conventional notion propagated and hyped by media that puts material prosperity as a pre-requisite to happiness. The GDP per capita in Puerto Rico is \$16,800; in Mexico it is \$9,000; in Nigeria it is merely \$800 in contrast to the United States with GDP per

person of \$37,800 (which is nearly 47 times higher than that of Nigeria). Seemingly, money has little to do with happiness. Then, how does peaceful environment and sense of security make these 'not so rich' nations the happiest countries in the world? And ironically, the most serious problems emanate from industrially advanced societies, where unprecedented success and progress have, seemingly, fostered discontent, restlessness and sufferings. Undoubtedly, there has been vast progress in the areas of science and technology but somehow we have terribly failed in reducing human sufferings and pains. This success is ostensibly devoid of love, compassion and peace.

Findings of the survey bring out that though Puerto Rico, a small island, is endowed with rich natural resources its US territory suffers high rates of murders, violence and unemployment. Likewise, materially among the world's poorest people, Nigerians also encounter State induced violence, lack of basic infrastructure, apathy and defunct government services. So, people in these nations are happiest despite being in violent and unsecured environment. It implies that peace and security does not guarantee happiness.

Education and health are the important parameters of Human Development. The United Nations human development report (2003) ranks Nigeria at 152nd out of 175 countries, or 24th from the bottom for life expectancy, health, education, standard of living, and literacy. It is quite interesting to note that happiness is not linked to prosperity, peace, education, health or life expectancy. Then, what is the magic ingredient that makes these countries the happiest in the world?

Findings of the survey show that strong community ties and shared living is what makes these 'poor' (in terms of GDP and certain development indicators) nations the happiest countries in the world. Community living appears to hold the key for happiness among the inhabitants of these nations despite having challenges, sufferings and struggles.

Survey findings show that Puerto Ricans, Nigerians and Mexicans have lot of community festivals and celebration, ingrained in their culture that binds them into strong sense of trust and we-feeling. Puerto Rica has nearly 500 community festivals in a year. Community celebrations, singing and dancing together, merry making, act as antidote to stresses, pains and sufferings the people of these countries experience while living in harsh circumstances. The inter-dependence and shared living of these close knit communities provide courage to its inhabitants to thrive amidst adversity and poverty.

The findings above entail to break the popular notion that success is a prerequisite to happiness. Then, what are the facilitators and inhibitors of happiness and/or success? Few research studies in this regard may be looked into. Uchida, Norasakkunkit and Kitayama (2004) have noted that there are cultural

constructions of happiness and well-being. The authors identified substantial cultural variations in shared meanings of happiness, motivations underlying happiness, and predictors of happiness. Specifically, in North American cultural contexts, happiness tends to be defined in terms of personal achievement. In contrast, in East Asian cultural milieu, interpersonal connectedness is what characterizes happiness. Moreover, happiness is best predicted by perceived embeddedness of the self in a social relationship. Likewise, Lu and Gilmour (2004) have theorized that distinct and different characteristics of the conceptions of happiness are prevalent in Asian and Euro-American cultures. For Asians, socially oriented Subjective Well Being emphasizes role obligation and dialectical balance; for Euro-Americans, individually oriented Subjective Well Being emphasizes personal accountability and explicit pursuit. These studies somewhere answer the reason why despite poor economy and State's apathy, Puerto Ricans, Nigerians and Mexicans are ranked higher on happiness index. It also provides insight to social researchers and policy makers in designing interventions for real, authentic and sustainable success, progress and development, key to which lies in strong community ties.

Further, Kaushik (2005) finds that irrespective of their financial conditions, sense of security and well-being among elderly women in Delhi, depends on their relationships with their family members. Thus, an aged lady in rugs is contented with amicable and loving family relationships while another elderly lady with crores of property feels insecure and grumpy, having incongruent relations with significant others. In the same wavelength, Chan and Lee (2006) observe that older persons with a larger network are happier and that social support plays a mediating role. On similar lines, Lu and Argyle (1991), through series of experiments conclude that cooperativeness is one of the important determinants of happiness. Kim, Sherman and Taylor (2008) note that social support is one of the most effective means by which people can cope with stressful events. They observe that Asians and Asian Americans are more reluctant to explicitly ask for support from close others than are European Americans because they are more concerned about the potentially negative relational consequences of such behaviors.

Thus, the survey concludes that once our basic needs for survival are met, our happiness and quality of life is largely determined by the quality of our personal relationships – with ourselves, our partner, family, friends and community.

Osho quotes, "Who will you call a success – Alexander the Great or Jesus the Crucified". It has become imperative for us to ask this question to ourselves, what success means to us. Moreover, it also implies that one should carve out one's own definition of success, rather than 'others' defining it for us. Each one

of us is born with unique endowments, then how can we all have singular and same meaning of success and happiness?

Mr. Ratan Tata, in his speech at Symbiosis, Pune, on July, 2015, said, "Don't just have a career or academic goals. Set goals to give you a balanced, successful life. Balanced means ensuring your health, relationships, mental peace are all in good order. There is no point of getting a promotion on the day of your breakup. There is no fun in driving a car if your back hurts. Shopping is not enjoyable if your mind is full of tensions. Don't take life seriously. Life is not meant to be taken seriously, as we are really temporary here. We are all like prepaid card with limited validity. If we are lucky, we may last another 50 years. And 50 years is just 2,500 weekends. Do we really need to get so worked up?...It's OK, bunk few classes, score low in couple of papers, take leave from work, fall in love, fight a little with your spouse...Its ok....we are people, not programmed devices...! "Don't be serious, enjoy life as it comes".

Mr. Tata has raised a pertinent issue – if success is not coupled with happiness, contentment and well-being, then it should not be a pursuable goal. Happiness and well-being should be the crux of success. Happiness is an emotional state that shows our satisfaction with life. It is a measure of our quality of life. Psychologists and philosophers have asserted that happiness is the most fundamental motivation for all human actions. It is the hedonistic principle and our ultimate goal in life – to be happy.

Surprisingly, if questioned, most of us would maintain that our race for material prosperity is in fact to achieve greater happiness. We strive to attain material success as we believe that it would bring us more pleasure and satisfaction.

So, what is success? Do material possessions make us successful? Results of several studies, as delineated above, raise doubts over the very notion of success. Many of us do believe that money is the main measure of success, because of the materialistic nature of society. Even the mental agony suffered and negative behavioural dispositions of the affluent and the rich are readily overlooked under the shine of their 'success' and prosperity. Seemingly two aspects need to be understood in this regard –

One, studies have shown that culture plays a critical role in determining the notion of success in that society. The Market or the culture of consumerism has been continuously bombarding us with the messages that our happiness lies in materialistic possessions (see: Goldberg, 2006). It is the Market that is creating demand for consumer goods and making us believe that 'success' is the pre-requisite for happiness. And we cannot be successful and hence happy till the time we 'achieve' and 'own' certain material possessions. Thus, the Market culture creates an inner discontent and convinces us that we can 'buy' happiness and that



wealth is the path to permanent fulfillment and well-being. We hardly realize that this inner discontent cannot be fulfilled with material possessions.

We look to external things to try to alleviate our inner discontent. Materialism certainly can give us a kind of happiness - the temporary thrill of buying something new, and the ego-inflating thrill of owning it afterwards. And we use this kind of happiness to try to override - or compensate for - the fundamental unhappiness inside us.

Coming to the second aspect, quite paradoxically, the race to material possession is endless – it 'seems to' provide happiness (in future) but actually it doesn't. Material success does bring happiness, but the amount of happiness gained makes only a small contribution to our feeling of wellbeing. Dr. Michael Fordyce describes this phenomenon as the "happiness law of diminishing returns" which states that achievement in any area of life adds to happiness only up to a certain point. For instance, even slight raise in salary, when one's income is quite low, may add to one's personal happiness but once he/she reaches a median income level, each increase in income produces an ever diminishing level of additional happiness for his/her efforts.

Thus, evidences fail to show any correlation between wealth and happiness, though it may appear to. Studies have shown that once our basic material needs are satisfied, our level of income makes little difference to our level of happiness. Researchers in positive psychology have concluded that true well-being does not come from wealth but from other factors such as good relationships, meaningful and challenging jobs or hobbies, and a sense of connection to something bigger than ourselves (such as a religion, a political or social cause, or a sense of mission).

So, time has come to redefine success. The noted physician and spiritual guru, Dr. Deepak Chopra defines it as, "Success in life can be defined as the continued expansion of happiness and the progressive realization of worthy goals. There are many aspects of success; material wealth is only one of them. Moreover, success is a journey, not a destination. Material abundance in all its expressions; happens to make the journey more enjoyable, but success includes good health, energy, enthusiasm for life, fulfilling relationships, creative freedom, and a sense of well-being".

This is the holistic definition of success that integrates various facets of life and calls for balance or equilibrium. Chasing materialistic gains at the cost of health and/or love relationships in life cannot bring us happiness. The corporate infuse huge resources in advertising their products that tend to define our needs and aims of life. These advertisements seep deeply in our unconscious mind and we start believing that there is no happiness in life without the possession of the luxury car, the big house and other limitless items and

products. The chase of materialistic acquisitions cannot fulfill our inner loneliness; rather the stress encountered takes a heavy toll of our health. Social work profession can and should play crucial role in deconstructing 'success', whose indicators are set by the Market. Sensitizing, cognitive restructuring, behavior modification techniques, are some of the strategies that can be helpful in dealing with compulsive thoughts and behaviours related to lopsided materialistic success.

Drawing from the findings of research studies showing strong linkage between community ties and happiness, social work professionals may work for harmonious familial and neighbourhood relations. Shared activities in the community and mobilizing and institutionalizing people's participation are some of the aspects of harmonious community and social relations, which social workers can focus upon. The byproduct of these interventions would ensure happiness.

Further, lopsided success characterized by principles of consumerism has led to indiscriminate exploitation of natural resources like rivers and forests that has precipitated an accelerating environmental crisis and serious decline of the eco-system. To save our planet, we require a balanced notion of success. A growing body of research is demonstrating that as we become happier and healthier (physically as well as emotionally) we become more compassionate and start caring more about others (including ecological concerns). With happiness, we start healing our relationships with ourselves first, followed by our family, community, humanity and the ecosystem. Happy people naturally care about others. On the contrary, unhappy people do not connect naturally – rather, they feel alienated and separated from others, nature and the world. Social work profession along with other human service professions may work on improving intra-personal, inter-personal and social relationships, which can realign people on the path of true success.

Another significant aspect that must be looked into is the seed of frustration and violence is inherent in the notion of 'success'. It is the intrinsic characteristic of success that only a few reach to the destination while most fail. The failed ones are clasped with frustration and despair. And, since only the successful people are appreciated and respected whereas the failures receive rejection, ridicule and isolation, ends become more important than means. In their quest for success, people do not hesitate in using different methods, and all too often, these means are aggressive and harsh. For the sake of selfish gains, many people commit terrible cruelties and sufferings upon their fellow-beings. In the modern world, perhaps we have forgotten values of interdependence, shared living, cooperation, and such others as competition, independence and personal achievement have taken over. For attaining success (which would provide happiness), we assume that winning through the cut-throat competition, race against

time, selfish focus are crucial. However, research studies mentioned above claim otherwise – community ties, social support and amicable personal relationships are ingredients of happiness.

For achieving true success which brings happiness and contentment and is not at the cost of others' happiness, renowned surgeon and spiritual leader Dr. Deepak Chopra delineates seven (spiritual) laws of success. Details are as below:

The first one is the Law of Pure Potentiality which depicts the power of our inner being or consciousness or the power of our spirit. In common parlance, we identify with our false image or the ego. And, the ego is dependent on others' perceptions about us. It thrives on the approval of others. It wants to control because it lives in fear. The modern day notion of success, which is mad race for materialistic possessions and external power, is linked to the ego. It is dependent on selfish motives, competition and proving oneself the best. But the ego is merely the social mask and not who we really are. The need for approval, the need to control things, and the need for external power are fear based. This kind of power is not the power of pure potentiality. Chopra (2008) quotes, "If you want to reach a state of bliss – make a decision to relinquish the need to control, the need to be approved and the need to judge". The more we connect with our 'real self' the more we are able to experience and use the law of pure potentiality. For this, practicing non-judgmental attitude is required as through the lens of ego we judge others. Mindfulness is the key to self-knowledge, which can go a long way in making us capable enough to use our inner potential. Engaged in ruthless competition, often, we fail to cherish little joys of the nature. Connecting with nature not only makes us healthier but also happier. It is easier to be 'silent' and away from the constant chattering of the mind when one is connected with the nature.

The second one is the *Law of giving and receiving*. Since our childhood, we are taught 'whatever you sow, so shall you reap'. This is based on the fact that everything in the universe operates through dynamic exchange. Love begets love. If you want appreciation give appreciation. While running behind the success, we often create hatred and enmity against our competitors or anyone posing hurdles in the way of our goals. Seeds of hostility breed much of aggression and antagonism filling our life with sufferings and pains. On the other hand, if our heart is filled with love and happiness, we radiate with positive energy, joy and ecstasy. Social work professionals can help in myriad of ways in promoting mutual respect and positive regard, amicable relationships at workplace and inculcating values of love, care and compassion. In fact, instilling sense of gratitude among people, which is very simple but very powerful application, can help in creating a loving and caring community.

Third, related to the above one, is the *Law of Karma or cause and effect*. Every day, in our lives, we make choices and oftentimes this decision-making is unconsciously. As an instance, a story from the life of Gautam Buddha may be cited here. A man came to Gautam Buddha and started abusing him. The Buddha calmly and patiently listened and after a while asked him, "brother! Do you have to say anything else"? The man got bewildered and uttered, "I rebuked and abused you, why are you not using harsh words against me"? The Buddha replied, "It is my choice... whether to react or not, whether to accept your abusive words or not...". Most of us would have reacted, whether overtly and silently, creating much of grief inside us. So, witnessing the choices we make every moment and examining these choices, evaluating the consequences of these choices and making conscious choices would make us free from the compulsive reactions and negative thinking patterns.

Fourth one is *Law of Least Effort*. It includes complete acceptance of people, circumstances and events as they are in this moment. We exhaust lot of energy in resisting, cribbing and reacting when situations go adverse. Acceptance saves that energy which can then be utilized in finding creative solutions. One component of this law is taking every hurdle as opportunity. History is full of numerous examples where common people have achieved success by converting their adversities into opportunities. A small American businessman had an adhesive making factory. Once due to inappropriate proportion of chemicals mixed, made the adhesive far less sticky than the desired levels. This created the fear of huge loss to the company. The owner got the idea of making 'stick-on' strips. And he earned profits multiple times than the usual rate. This is one small example of changing hurdles into stepping stones.

*Law of Intention and Desire* is the fifth one that focuses on 'attention'. It claims that whatever we put our attention on grows stronger in our life and vice versa. It also stresses on 'creative thinking'. If we focus on positive aspects of life, remove thoughts of failure, pain, despair, from our mind, success becomes all the more a predictable event in our lives. Thoughts are very powerful. They are often taken as the seeds of reality. Negative thoughts add to the problems and challenges while positive thinking makes us more creative, happy and more close to our destination or success.

Sixth one is the *Law of Detachment*. Here, practicing detachment means freeing oneself from the attachments of the results of our actions. Detachment helps us remain calm and composed and even accept uncertainty as it means staying alert to the opportunity within every problem by letting go of your idea of how things should be. In one's willingness to accept uncertainty, solutions spontaneously appear. It also means enjoying mystery and magic of pure potentiality.

Lastly, the *Law of Dharma or Purpose in Life* seeks to discover one's unique talents, divinity and serve humanity with the expression of these talents. When one's creative expressions match the needs of fellow humans, wealth spontaneously flows. It may be reiterated that oftentimes, we learn the faulty meaning of success based upon the competition and struggle, creating antagonism and rivalry. And then we set goals of life to achieve success by acquiring materialistic gains – big bungalow, cars, luxuries and power to control others. Though seemingly few of us may achieve our goals but internally we fail terribly as we get disconnected with true meaning and purpose of life – world hardly remembers rich and wealthy people but those who devote their life for the well-being of humanity.

Thus, the above discussion shows that success and happiness can go hand in hand rather than the popular myth that happiness follows success. It also falsifies the idea that a few win or succeed at the cost of others – that life offers dichotomous and opposite aspects of success and failure. Happiness is holistic and is felt by remaining connected with nature, with fellow beings, and not preoccupied by rigid mental frameworks of how the life 'should be'.

Social workers are considered as the 'doctors of relationships'. Though a gigantic task, social workers can and should redefine meaning of happiness and success. This newly defined success is based on nurturance of human relationship, love, care, interdependence rather than mad race after materialism. Here, happiness is not the byproduct but one of the ingredients of success. While the popular belief of success indirectly results in aggression, cruelty and exploitation, this new notion of success is not only cost effective but also a way to get rid of violence, torture and abuse. It is the real and true meaning of success, which is natural and sustainable. For achieving this, social workers are required to work on reviving the culture of strong community ties and cultivating love and respect, care and support among individuals, groups and communities. Tint of spirituality in social work practice would help in finding 'real' solutions of human problems. Lastly, in the words of Charlie Chaplin, "You need power (and success), only when you want to do something harmful, otherwise, love is enough to get everything done".

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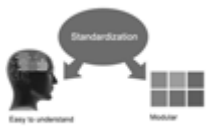
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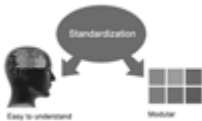
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# INDEX

---

---

## **A**

Adapazari · 8, 2, 3  
Ascentism · 37

---

## **C**

Calvinism · 36, 37, 38, 39, 40  
Committees · XLIX

---

## **F**

Fireyihun · 6, 14

---

## **G**

Gandhians · 5  
Glassmars · 40  
Gonzonal · XLVIII

---

## **J**

Jurisprudence · 35

---

## **N**

Naihatsuteki · 5  
Nomothetic · 39

---

## **P**

Pressuresare · 4  
Procrastination · 12  
Proletarianized · 36

---

## **W**

Wolaita · 45, XLVI, XLVII  
Wormuma · XLVI, XLVII, XLVIII, L, LI, LII



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