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Social Policy Issues

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## **STUDIES**

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## ***Paid Parental Leave and Reconciliation of Childcare and Work in Lithuania***

### ***Abstract***

The paid parental leave is one of the measures of social welfare encouraging the employment of parents (and especially mothers) through the paid leave to take care of children. This article explores how the paid parental leave system contributes to the reconciliation of childcare and work in Lithuania. It is based on semi-structured interviews with parents of young children (N = 19) to analyse how parents of young children evaluate reconciliation of childcare and work during paid parental leave. The main findings of the research revealed that long-duration paid parental leave does not encourage parents to return to the labour market during parental leave. This study also showed that the parents' (especially mothers) possibilities to work during childcare is rather limited. This is mainly due to the still to a large extent dominant traditional gender

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role division, gender (un)equal leave policy designs, lack of childcare infrastructure for the youngest children. The findings of this study are expected to contribute to scientific debate on the role of paid parental leave and reconciliation of childcare and work. It also provides valuable insights to the discussion on implication of gender (un)equal leave policy designs and gender in(equalities) in employment.

**Key words:** paid parental leave, reconciliation of childcare and work, Lithuania

## *Introduction*

The reconciliation of work and life responsibilities has become an increasingly relevant policy topic in recent decades. Over the last years, the issue of reconciling work and family life has been high on the agenda of many countries and international organizations, with a view to promoting equal economic independence for women and men and removing obstacles to women's equal labour market participation. This broad topic covers notably the provision of maternity, paternity, and parental leaves, the use of flexible working arrangements, the access to care services for children and other dependents, and the equal sharing of household and care responsibilities between women and men.

Lithuania, as other post-communist countries, has undergone many changes in the social welfare and social protection system. For the development of welfare state policies an essential point was the transition from a socialist to a capitalist regime that started in 1989 and the EU accession in 2004 (Dobrotic & Stropnik, 2020). In this context leave policy reforms based on two EU directives had a crucial impact on national leave policy developments. Paid parental leave is an important social protection which allows parents to reconcile childcare and work. Different paid parental leave characteristics (conditions, duration, amount of the benefits) play an important role for reconciliation of employment and childcare among parents (and especially women). Bonoli (2013) argues that long term parental leave with low replacement rates has a negative impact on women's labour supply. Cantillon, Vandenbroucke (2014) state that encouragement of employment of parental leave schemes depends on the length of the leave, the conditions of entitlement, and the generosity of the benefit. Additionally, national leave policies are continuously evolving because of changing governments, political coalitions and economic pressures (Thevenon & Solaz, 2014).

Recent representative studies carried out by the Ministry of Social Security and Labour (2017; 2020) and by the Office of Equal Opportunities Ombudsman office (2020) have revealed that there is still strong support for traditional family and gender roles in Lithuania. From the administrative and research data (Braziene & Vysniauskiene, 2020; Duvander et al., 2019, etc.) from many countries, it is evident that women/mothers still take the largest part of parental leave. However, the share of fathers taking parental leave is also increasing. Various measures have been introduced to encourage fathers to use parental leave. Mostly these are wholly or partly individualized entitlements so that fathers not using their 'quota' lose it, as unused leave cannot be transferred to a partner.



This study also showed that parents (especially mothers) possibilities to work during childcare is rather limited. This is mainly due to the still to a large extent dominant traditional gender, gender (un)equal leave policy designs, lack of childcare infrastructure for the youngest children.

The aim of this article is to analyse paid parental leave system contributions for reconciliation of childcare and work in Lithuania. The findings of this study are expected to support scientific debate on the role of paid parental leave and reconciliation of childcare and work. Additionally, by being complemented with evidence from Lithuania, the article may support the debate on social policy in Eastern Europe since the scientific debate on paid parental leave and reconciliation of childcare and work is rather limited in the region. This article also provides valuable insights to the discussion on implication of gender (un)equal leave policy designs and gender in(equalities) in employment.

### ***Theoretical framework***

The activating nature as welfare policy of parental leave and childcare service provision was emphasized by Ghysels and Van Lancker (2011); Cantillon and Vandenbroucke (2014); Johnson and Tunheim (2016); Valentova (2019). They defined it as measures allowing for reconciliation of work and family life.

Three factors that may influence mothers' abilities to combine work and care include: public childcare (Budig et al., 2016; Williamson, 2015), duration and benefits levels of parental leave policies and taxation policies on wage of the second earner (Budig et al., 2016; Dearing, 2016; Ray et al., 2010; Schadler et al., 2017). Kluge and Schmitz (2018) stated that a medium length leave with generous benefit entitlements can increase job continuity and supply of mothers in the workforce.

The importance of leave benefits for the families providing the money, time, and job security to care for dependents has been emphasized by McKay, Mathieu (2016). Kowalewska (2017) focused on the regimes activating single mothers and found that most Mediterranean and post-Soviet countries try to include single parents in employment. Johnson and Tunheim (2016) emphasized the importance of parental leave policies working in tandem with a high coverage rate for childcare for the family and work reconciliation.

The importance of private or personal circumstances of the family was emphasized by Guerrina (2002). As stated by Björnberg (2002), the social construction of male identity is related to identification with a professional role, commitment to work, and providing for the family, while women are taking care of children. As it is stated by Javornik and Kurowska, *fathers are more sensitive to any income loss than mothers, and that the level of the potential income shock caused by the use of parental leave determines whether fathers take the leave at all* (Javornik & Kurowska, 2017).

Culture plays a major role in deciding who has to care for a child (Björnberg, 2002; Kangas & Rostgaard, 2007; Singley & Hynes, 2005). Nowak et al. (2013) stated that the decision to return to work can be affected by feelings of guilt about whether a woman can

be both a good mother and a good employee. On the other hand, according to Singley and Hynes (2005), mothers usually play a primary role in “balancing” work and family for the couple in the initial period of parental leave. Vujinović (2014) distinguished the financial aspect of the decision to return to work. Boye (2015) stated that men usually have higher wages and better prospects in the labour market. Thus, the relative income is central to understanding the division of this leave (Boye, 2015; Whitehouse et al., 2008). Bünning and Pollmann-Schult (2016) found that the father’s higher education is associated with more egalitarian gender role attitudes.

Following Kvist’s (2000) study on activating welfare states, three aspects of welfare state that contribute to employment were defined: (1) de-familiarisation of caring tasks through social services for children and the elderly, which in turn allows women, in particular, to (re-)enter the labour market, (2) de-commodification of labour through easy accessible and relative generous cash benefits providing a more flexible labour market, and (3) re-commodification of labour through conditioning of benefits and active labour market policies giving the long-term unemployed and people with low skills better opportunities to participate in the labour market, whether the ordinary or in special activities. Kvist (2000) has analysed the relationship between the state, the market and the family. According to Kvist (2000), the welfare states take over caring tasks from the family, thereby opening women’s opportunities to participate in the labour market. It is called a “de-familiarisation of the welfare state”. Decommodification means that relatively generous benefits for persons in shorter periods between employment are provided and ensure the flexibility of the labour market. De-familiarisation may increase if women can opt more freely for the labour market than if the welfare state contributes towards defamiliarization of caring tasks. It helps women to become commodified. Kvist (2000) stated that the Scandinavian model is distinguished with high de(familiarisation) (extensive childcare and generous parental leave schemes), high commodification (flexible employment protection legislations) regarding paid parental leave schemes.

Reconciliation of family and work is related to a favourable workplace environment. As stated by Bergmann (2008); Nowak et al. (2013); Williamson (2015); Schadler et al. (2017); Gloor et al. (2018); Vujinović (2014); Lott (2020), the employee-centred workplace flexibility would be the resource for the families seeking to manage the demands of their work and family domains. Johnson and Tunheim (2016) Lott (2020) stated that compressed work schedules and telework enable women to better balance their formal employment. Whitehouse et al. (2008) defined that job characteristics prior to the birth may affect financial and/or workplace security and impinge on attitudes to returning to work.

The perspective of the manager is important for the family-work reconciliation because managers hold key positions in organizations (Nordberg, 2019). Nordberg (2019) stated that parental leave has a different meaning within an organization in which the goal is to improve efficiency, profit, personal reputation etc. Björnberg (2002); Nordberg (2019) pointed out that the priorities of firms are primarily geared at protecting the interests of the business, and they recognize the needs of staff only under the pressure of necessity. Additionally, Mun and Brinton (2015) stated that the employees’ absence

may pose problems for the workplace in the case of occupations where competence and work tasks are respectively less individualized and have longer timeframes. The workplace characteristics, sector of employment and type of employment contract are also important determinants of parental leave usage (Geisler & Kreyenfeld, 2019). Borgh et al. (2018) disclosed that parents who experienced positive attitudes towards parenthood among colleagues and managers were more likely to experience high occupational balance.

### *Country context*

Generally, Lithuania can be characterized as a country with low total fertility rate (1.6 in 2018), aging population and high emigration rate of working age population. In terms of employment, Lithuania is among countries with relatively high employment rates for both women and men. The country's key features are high labour participation rate for women, the low gender employment gap, a high full-time equivalent employment rate for women and men. The employment rate (population aged 20–64) in 2018 was 76.7% for women and 79.0% for men, both on an increasing trend during the last decade. The women's unemployment rate is even slightly lower than men's (women had an unemployment rate of 5.4%, with men — at 6.9% in 2018). However, the gender pay gap has been constantly increasing since 2012 and we can observe a slight decrease from 2017. The gender pay gap amounted to 13.0% in 2018. The gender pay gap differs considerably by age groups. The highest gender pay gap was for the age group 35–44 and constitute 19.1% in 2018. For the age group of 25–34, the gender pay gap amounted to 13.7% in 2018.

Lithuanian labour laws provide equality for all the subjects irrespective their gender, age, etc. and prohibit the discrimination. Reconciliation of work and family responsibilities is defined by the Lithuanian Labour Code (2016). The possibility of returning earlier to work from parental leave, having more conditions for flexible working and combining the responsibilities of family and work are legitimised. Parents with children are entitled to shorter working time, longer annual holiday and other leisure time devoted to family responsibilities by the Labour Code. The Labour Code restrains terminating work contracts with parents raising children under 3 years. Thus, the employer cannot make an employee redundant during/after parental leave, unless they both agree.

In recent years, Lithuania has introduced measures for a better reconciliation of family and working life. The availability of flexible working time arrangements has increased as the new Labour Code (2016) entered into force. This introduces new types of employment agreements and has brought flexibility to labour relations whilst individual arrangements, such as flexible work schedule, individual working regime, overtime, and summary working time, can be requested (although there is no obligation for an employer to agree). In 2018, the Lithuanian Parliament approved Demography, Migration and Integration Policy 2018–2030 Strategy and Demography, Migration and Integration Policy 2018–2030 Strategy Action Plan 2019–2021. The first goal of the strategy is to develop a family-friendly environment, e.g., development of conditions for family members to reconcile professional and family responsibilities, to improve quality and accessibility of services and financial support for families.

Since 2016, the pre-primary education of 6-year-old children is compulsory and free of charge in Lithuania. The pre-primary education is mainly provided by the kindergartens, multi-functional centres and primary schools. For all other ages, 4 hours a day (20 hours a week) of childcare is funded from the national or municipal budget. Parents only make a financial contribution to cover the cost of meals and learning materials and municipalities can reduce the fees paid by families based on their social situation.

### *Paid parental leave scheme and accessibility of the childcare in Lithuania*

During the last decades, there have been several developments of the paid parental leave system. Since the 2000s, there have been transformations of paid parental systems in many CEE region countries as well as in Lithuania. Childcare leave started to be gradually transformed into parental leave and being made available for both parents. The parental leave policies in Lithuania, as well as in other post-communist countries are based on traditional division of gender roles.

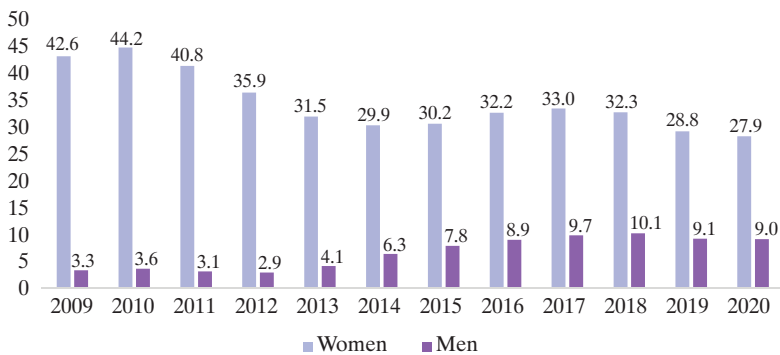
The paid parental leave scheme based on social insurance was introduced in 2000. In 2010 Lithuania introduced paternity leave. Currently, there are three childcare related paid leaves in Lithuania: maternity, paternity and parental leave. Maternity and paternity leaves are individual entitlements. Paid parental leave is a family entitlement. Major changes occurred after 2010, when as a response to an economical and financial crisis, a number of welfare retrenchment measures applied. Parental leave benefits have been reduced several times, and ceilings introduced. For comparison, in 2008, parents were entitled to 24 months of paid leave, which was reimbursed at 100% of the previous salary. On the impact of the crisis, 2009 the amount of paid parental leave reduced and parents were entitled to 100% of the parental leave allowance, up to one year and up to 85 percent — until the age of two years of the child. In 2010, another reduction in paid parental leave took place, when parents acquired the right to 90 percent the amount of paid leave up to the age of one and up to 75 percent of the previous salary until the child is two years old. Significant changes came into effect in 2011, with two options envisaged to parents: one hundred (100) percent of net earnings until the child is 12 months old, or 1) 70 percent of net earnings until the child is 12 months old and 40 percent of net earnings until the child is 24 months old. The remaining period of leave until the child is three is unpaid. Maternity, paternity and parental leave in Lithuania, as in many countries, is paid based on labour market participation and length of previous work record. With the tax reform in 2019, parents can choose between two alternatives to receive the benefit: 1) if duration of parental leave is until the child is one year old, the amount of the allowance is 77.58% of the replacement wage; if the chosen duration is until the child is two years old, the allowance is 54.31% until the child's first birthday and 31.03% until the child's second birthday. In the case of multiple births, the benefit is paid at 77.58% of the replacement wage. The benefit is earnings related and funded by contributions from the Social Insurance Fund, which is funded by contributions from employers and

employees (Braziene, 2020). The recipients of childcare benefits during the second year of the parental leave are allowed to work, while in the first year the benefit is reduced if the person has income from work. If parents choose to receive 77.58% of net earnings until the child is 12 months and start to work, the benefit is reduced by the amount of income they have received. If parents choose to receive 54.31% of net earnings until the child is 12 months old and 31.03% of net earnings until the child is 24 months old, and parents start to work during the first year, the benefit is reduced by the amount of income they have received; during the second year, the benefit is not reduced (Social Insurance Law on Sickness and Maternity, 2000).

There has also been a discussion around introducing a shared parental leave between mothers and fathers, some amount of which must be taken by the father; however, there are no legislative changes at the moment.

The administrative data showed that from 2009, the share of fathers taking parental leave is increasing (see Figure 1).

**Figure 1. The average monthly number of recipients of benefits for women and men**

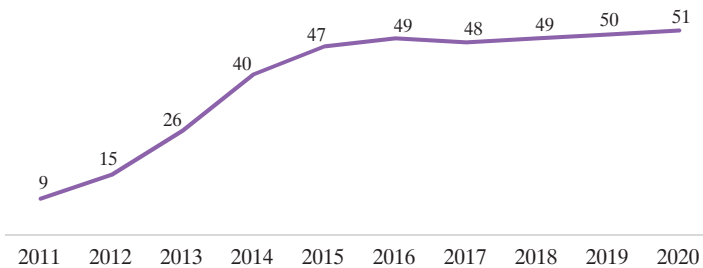


Sources: SODRA (State Social Insurance Fund Board).

From the administrative data provided by the social insurance fund board (SODRA), it is also evident that during the second year of parental leave, the percentage of men taking it has been constantly increasing since 2011, e.g., from about 11.4% in 2011, to 39.5% in 2018, and for women (for the second year), decreasing accordingly from 88.6% to 60.5%. This option is particularly popular among fathers, because the benefit (for the second year) is not reduced and fathers can work whilst receiving the benefit. Although this means that some fathers are working while receiving the benefit, and the mothers are spending actual time with their children. Families choose this for mostly economical calculations and reasons. It is more useful to use the father's income in the second year, because the benefit is 40% of net earnings, and while in most cases fathers usually earn more, families choose this structure as more beneficial. However, there is a lack of information on how many fathers are actually spending time with their children in the second year of their lives while receiving the benefit, and how many of them are working. The share of working

parents has significantly increased since 2014 (by about 14 percentage points), and it has been slightly growing during the last three years (see Figure 2). The implementation of different projects can partly explain the changes in 2014, for example, the “Complex Services for Families” project funded by the ESF program according to 2014–2020 or the EU funds investment action program eight priority “Increasing Social Inclusion and Combating Poverty” aimed at promoting positive fatherhood for parents raising children aged 1–3, family consulting and other services for families. These projects encouraged changes in the families’ attitudes towards the balancing work and childcare.

**Figure 2. Parents working during the second year of parental leave (%)**



Source: Social Insurance Fund Board data Lithuania.

Generally, institutional childcare is non-mandatory in Lithuania and can be provided for the children from birth up to 6 years of age. By the application order, with exception of the priority groups that are foreseen by the law (for children with special needs, for children from disadvantaged families etc.), the caring staff ratio in relation to the number of children is defined. Thus, if children are up to one year of age, 3 persons of staff can take care of a maximum of 6 children. If children are 1–2 years old, 10 children can be taken care of by 2 persons of staff and the number of children is increasing by age with the same 2 persons of staff. The provision of childcare is decentralised, and it is mainly under the responsibility of local municipalities. This means the providers of childcare can organise the care time, holidays time and programmes. The state subsidises 4 hours of education per day in day childcare institutions. The decentralized system of day childcare, the requirements of staff in relation with children by age create the obstacles to availability of day childcare, especially if the child is under 2 years of age. Requirements for a higher number of staff result in higher costs of such day care. Thus, the lack of state day care institutions is mostly felt in the group of youngest children and the private sector fulfils this gap. Parents can choose between state or private day childcare institutions; however, the costs of private day care are significantly higher. As a result, the state day childcare for children under 2 is scarce in Lithuania.

Voluntary childcare either in an institution or in the family and long parental leave create a familiarizing effect on childcare during the first two years after the child’s birth. Low accessibility of state childcare for the youngest children strengthens the effect of

familiarisation or in other cases has a commodifying effect on day childcare because the gap in state provision with institutional childcare is bridged with private providers, which means higher prices for services.

### ***Data and Methods***

To obtain the data for the analysis of the role paid parental leave and reconciliation of childcare and work, a qualitative semi-structured interview method was chosen. This method allows us to identify parents' attitudes, choices and perspectives (Babbie, 2013). This method makes it possible to authentically record experiences and perception of parents.

The survey instrument (interview guidelines) consists of the questions focused on the following topics: factors determining paid parental leave decisions and choices, family social and economic situation and paid parental leave decisions, childcare accessibility, childcare quality, reconciliation of childcare and work during parental leave and general evaluation of paid parental leave system in Lithuania. The selection criteria for informants were therefore as follows: (1) parents (mothers or fathers) of children aged 0–6; (2) paid parental leave during the last 3–4 years. Fieldwork was conducted from April to August 2020. On average, an interview lasted 55 minutes. The shortest interview lasted 40 minutes, the longest — 1 hour 30 minutes. In total, 35 people meeting the selection criteria were asked to participate in the study. The interviews were conducted in a park, in a café or using the Zoom online video call platform. A total of 19 parents (17 mothers and 2 fathers) participated in the study. The age of participants varies from 23 to 44 years of age. 18 participants are with tertiary and 1 with secondary education. By marital status, 15 participants were married, one was divorced, and three were living in a partnership.

More fathers than mothers refused to participate in the study. The main argument for their refusal was that they are not competent enough on this topic. The interviews were carried out in April–August 2020. After achieving data saturation after 16 interviews, in addition three interviews were conducted but in terms of content no new information was received. The study was carried out in line with the ethical principles of anonymity, confidentiality and privacy.

The data was analysed employing the qualitative method of content analysis comprising three steps: multiple reading of the text; identification of manifested subcategories; combining the subcategories into larger categories (Miles et al., 2014).

### ***Paid parental leave and reconciliation of childcare and work: the parents' perspectives***

Data collected during the interviews shows that generally, parents are satisfied with the amount of the benefit and length of the parental leave. But some of the informants tend to support higher benefits and stress that there should be no ceilings for parental leave benefits. Recently (in 2019) due to the tax reform, the decreased amount of the

parental leave benefit is not very favourably assessed by the informants. When it comes to reconciliation of parental leave and work, almost all of the respondents agree that there are limited possibilities to combine parental leave and work for parents with the young children aged 0–2. This is mainly due to the fact that, for example in case of employment and income in the first year, the benefit is reduced by the received amount. During the second year in case of income, the benefit is not reduced, but in the opinion of the respondents, the benefit in the second year is too low (at 31.03%). Also, there are difficulties in reconciling childcare and work for parents with children aged 0–2 (because of lack of public childcare institutions for the youngest children; private childcare institutions are very expensive; many families cannot afford to hire a babysitter, etc.). Due to the lack of pre-school facilities for children aged one (and younger), most parents (mostly mothers) are unable to return to work.

Some of the informants suggest that the paid parental leave should be extended until the child is 3 years old. By the opinion of the respondents this is because the fact *that not all children over the age of 2 are ready to go to kindergarten and separate from their mother*. Also, some of the informants suggested that more flexible parental leave schemes could be introduced. In the opinion of the parents, it would be appropriate to break parental leave into several parts and to take the leave when it is most needed by the family: *I think, would encourage most fathers to take parental leave*.

### *Factors determining paid parental leave decisions and choices*

Paid parental leave provides working parents an opportunity to reconcile work and childcare as well as compensates loss of income. Family paid parental leave decisions on who (mother or father) will take parental leave is highly influenced by the number of different factors. The family decision on paid parental leave is based on the culture of traditional family and gender roles, the financial situation of the family and the understanding of what is best for the child and other individual circumstances of the family: *There was no agreement: I just care for our child and the husband earns money I.14. My wife took parental leave, it seemed obvious to us*.

The still dominant traditional family and gender roles in Lithuanian society strongly overlap with the financial situation of family and income inequality between women and men in Lithuania. The gender pay gap, income inequalities, wage differences between women and men determines that more women than men take parental leave. Vujinović also distinguished the financial aspect of returning to work (Vujinović, 2014). Income inequality between women and men is reflected in the interview data. The decision on childcare and support for traditional roles are grounded in the more stable male career and higher salary as men generally have higher wages and better prospects in the labour market: *It was more financially beneficial for our family because the salary of my husband was a few times higher than mine. My career was at the beginning, while my husband had already gained an excellent*



*foothold in the labour market. And partially, the decision was predetermined by the traditional family model I.8 I went on parental leave because my husband's salary was higher.*

The expectation and cultural norms for motherhood and fatherhood are traditional and seemingly quite resistant to change in everyday life (Björnberg, 2002). The importance of the mother during the first years is another important factor for family paid parental leave choices and decisions. The indispensable caregiving role of a mother is based on understanding what is best for her child. The interview findings revealed that informants stress the importance of a mother's role during the first years of a child's life. The mother's role is perceived as her responsibility and as a continuation of her relation with the child, which started before the birth *I think that for me as a mother it is important to be with my child during the first year of life because I was carrying him/her inside me when I was pregnant for 9 months, ...The mother goes on parental leave because the attitude of our family is that the mother is needed for a child up to 2 years of age.*

Several informants emphasize that the most important thing is for the child in the first year after the birth to be with the mother, and the second year could be already optionally combined with work depending on particular family circumstances. Such a decision depends on the choice of an individual family and relevant circumstances. Only one informant points out that paid parental leave should last to three years of age. The main argument of this informant is that not every child is prepared to be separated from his/her mother after two years.

The understanding of the importance of the relationship between the mother and the child is the main motive of the decision on who will care for the child. On the other hand, such understanding has an impact on the decision about how long the relationship between the mother and the child should last. Two-year parental leave, which is provided for in the law, is acceptable and appropriate for growing a child at home. The data of the interviews revealed that such duration of parental leave is a usual choice in families. Thus, the duration of parental leave is mainly given a favourable evaluation. In other words, the norm of law is internalized, and it is consistent with the cultural understanding of what appropriate and good childcare is: *Duration is very great and appropriate for fostering the affectionate parenthood values.*

A few informants indicated that the amount of parental leave benefit is too low. According to them, in the case of commodified childcare, a higher parental leave benefit could compensate for it. To sum up, more women than men take parental leave in Lithuania because of the traditional family roles culture and wage inequality. The duration of parental leave, which is legitimised by law, is an internalized norm in family choices. The balance of work and family during parental leave is not understood as a widespread or unified practice. The father's role is dependent on possibilities, carried out after work or on weekends in the circumstances of traditional roles in the family. That inequality of childcare is an internalized norm, and the informants call it mutual both parents' childcare.

*Childcare availability and accessibility*

Successful reconciliation of work and childcare is closely related to the public childcare system. Places for the youngest children (under one year of age) in childcare institutions is rather very limited in Lithuania. This is especially an issue in the capital and other larger cities. In this context could be mentioned that there is a positive relationship between women's labour market participation rates and the availability of formal childcare arrangements (Nowak et al., 2013). The data of interviews revealed that informants experience problems related to childcare availability and accessibility. The accessibility as a problem is characterized through the waiting time or registering time for day-care: *We registered daughter just after her birth, but we had to wait more than one year and half to get a place in day care (A); The day-care is accessible if we register a child just after the birth, We waited for a place in day-care for one year.*

A few informants emphasized that only state day care is insufficiently accessible. As a consequence, according to one informant, it is necessary to choose private day care, which is expensive. Thus, calculations have to be made on the cost and benefit of working. Some of the informants are ready to allow their child to attend day care earlier, e.g., it means at the age of one year or one year and half. However, *It is very difficult to find day-care for one-year-old children. And it is impossible to find such day-care for children under one year. Services for such children offered privately are extremely expensive. So, the mother has to spend a major part of her salary on this service.*

Quality of the childcare services is also an important factor for reconciling childcare and work during parental leave. The findings from our data are rather contradictory. Some informants find the quality good; the others would like more care for their children from educators. One informant would like an individual education plan and expressed disappointment that private day care does not ensure that. The accessibility problem revealed itself discussing the quality of children day care: *It would be sufficient to ensure development of the day care network and to satisfy the demand. An ideal place would be near the home or workplace.*

The lack of state childcare in Lithuania is partly compensated for by the private childcare institutions. As a consequence, it is accessible only for parents, who afford to pay for the services. Other parents who cannot afford private services encounter uncertainty about further childcare or are put on a long waiting list to the state day-care. Such reasons determine the familiarisation of day care for children under two years of age. The legal norms allow providing children with preschool education in the family or in an institution by choice. Thus, to sum up all these circumstances encourage families to choose a family-centred model. The childcare familiarisation is attributed to women due to the culture of traditional family roles in Lithuania. As a consequence, about half of women who are on parental leave withdraw from the labour market for two years.

### *Reconciliation of work and childcare during parental leave*

Parental leave institutional features are important for the decision of the parents when to return to work, however the complex of factors have an impact. Long parental leave withdraws parents (in the majority of cases, the mothers) from the labour market. This has a negative impact on the future career, income and personal development. The balance between work and family responsibilities is not as revealed as prevailing trends but rather as different evaluations of informants. Some informants see the following benefits from the balance of work and family: a break from childcare, encouraging the autonomy of the child, ability to continue the mother's professional career and increase in family income: *It is best to combine work and childcare. Although the state guarantees good conditions to care for a child and the employer has responsibility to secure a workplace for three years, it is dangerous to stay with your child for two years. The woman drops out from the labour market. She does not have any career development, her wage does not increase, she loses her working skills or her skills become outdated. I have read a study that revealed that childcare for a long time can be the consequence of 20 percent of financial loss without compensation. It is a strong argument to combine work and childcare.*

Other informants emphasize the importance of attending to the child's needs during the first years of life, the need to care after other children in the family or in general, they express an attitude that such balance during parental leave is impossible. A few informants consider that the childcare system in Lithuania is not very compatible with the caregiver's desire to work. Firstly, it is not compatible because of its compensatory nature and rules. The benefit is reduced if a person has work-related income during the first year of parental leave. On the other hand, this is not applied during the second year of parental leave, but the commodification of childcare and the lack of state day care do not allow the caregiver to work: *The system is not prepared for such career women or even not career women but just for mothers who do not want to withdraw from the labour market or would like to return to the labour market after one year or after a half year of parental leave. And that system does not encourage that because it fails to ensure quality education and accessibility to childcare.*

As suggested by the state-of-the-art, long leaves for mothers can be harmful to women's participation in the labour market, their career prospects and lifelong earnings (Akgunduz & Plantenga, 2013; Hegewish and Gornick, 2011). Also, long parental leave may weaken the mother's attachment to the labour force (Budig et al., 2016). Evaluating the impact of parental leave duration on the career, some informants have observed that parental leave will not influence on their career, whereas others see a possible negative impact: *...generally, the birth of the child has negative impact on a professional career — the possessed knowledge does not remain relevant IK But I always thought that if I have to withdraw for two or three years as other mothers go on parental leave and continue it one more year, so I will return as an astronaut to the labour market.*

A long duration of parental leave, insufficient possibilities for the balance of work and family responsibilities in some workplaces tend to reduce favourable conditions for

development of professional skills. Thus, the return to work or new employment can become more complicated and require longer reversal duration.

Workplace flexibility is an important factor for reconciliation of family and work roles. In Lithuania, there are necessary legal preconditions to afford parents with young children flexible working time arrangements, but practical implementation rather differs depending on the type of organisation and other institutional factors. The findings from our study are rather diverse. Some informants observed that they have flexible working hours, others refer to lack of flexibility at all. In general, the data from interviews reveals the tendency that informants are not provided with remote work possibilities and other flexible working arrangements.

The evaluation of the attitude of the manager towards the work — family balance is different. Some of the informants are not aware of the attitude of the manager, whereas other research participants indicate a positive or even critical one. *“The employer has a good opinion on employees who are willing to work part-time but this rule is not applied for mothers raising young children. The employer is worried that such employees will frequently not be able to come to work because of the sickness of their child or will want to work only according to a schedule convenient for them. Thus, it can be difficult to plan the work schedule or ensure a sufficient number of employees in the shift”* inf. *“My plan to return to the labour market is after my child is one year old, but I’m afraid of searching for a new job because of the employers’ negative attitude”*.

### ***Discussion and conclusions***

Lithuania is among the European countries with long parental leave and relatively low provision of social services for the youngest children. There are different childcare and work reconciliation strategies among the informants, but the dominant trend is that mostly women take long parental leaves. Parental leave in Lithuania is for two years allowed to combine work and childcare during the second year of parental leave. As would be expected, and as is evident from other studies, parents are generally being very satisfied with the duration, eligibility and amount of the benefits. State day childcare is scarcely accessible for children under the age of two. There is a lack of childcare institutions for the youngest children (under one year of age). Childcare for the youngest children is mainly based on private institutions and is highly commodified. Such structural conditions overlap with the traditional family and gender roles and lead to familiarisation of women rather than to their activation during parental leave in Lithuania. The study revealed that reconciliation of work and childcare during paid parental leave is rather limited in Lithuania. The familiarised Lithuanian paid parental leave system withdraws parents (mainly mothers) from the labour market for a long period (in most cases, for two years).

The familiarisation of childcare up to two years is an internalized norm within families and the latter accept the duration of two years as appropriate and suitable for the best interest of their child. The long paid parental leave and the low accessibility of state childcare does not support return of women with young children to employment in

Lithuania. Approximately half of the women tend to withdraw from the labour market for two years and it results in deteriorating knowledge and skills as well as obstacles for development their career development. Voluntary childcare either in an institution or in the family and long parental leave create a familiarizing effect on childcare during the first two years after the child's birth. Low accessibility of state childcare for the youngest children strengthens the effect of familiarisation or in other cases has a commodifying effect on day childcare because the gap in state provision with institutional childcare is bridged with private providers, which means higher prices for services.

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*Can migrant men become more present  
in elderly care?  
Comparative analysis of migrant women  
and men in senior care.  
A case study from Poland<sup>2</sup>*

***Abstract***

This paper compares the character of work of migrant women and men in elderly care in Poland. Elderly care is provided mainly by migrant women. Men who work in this sector are in a clear minority. In the presented research a qualitative content analysis has been used. The paper discusses selected results of in-depth interviews conducted among 42 immigrants working in elderly care (11 men and 31 women). It was found that there are differences between sexes. Women indicated, *inter alia*, the following reasons for taking up work in elderly care: job knowledge, the use of migration chains and altruistic motives. Men did not refer to these factors. They said that they chose this sector because

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they saw a market gap. The studies showed that gender was often a decisive factor for employment in senior care men. Men are mainly employed to take care of elderly men. Gender can be an important factor in choosing the carer.

**Key words:** labour market, migrant, elderly care, gender, competencies, demand for work

## *Introduction*

Elderly care can be either formal (institutional) or informal (provided by family, friends, neighbours and, carers employed by relatives, including immigrants) (C. OECD, 2011); (Pavolini & Ranci, 2008). Elderly care in wealthy countries has almost become the preserve of migrants, willingly employed for this work, both legally and illegally. There is a growing tendency to treat migrant work as an alternative to formal care as the state is not always able to provide it (Bettio et al., 2006; Huang et al., 2012; Kilkey, 2010; Lutz, & Palenga-Möllnbeck, 2010). Foreigners play an important role in the care system in many countries, including Australia (Goel & Penman, 2015; Negin et al., 2016), the USA (Martin et al., 2009), Great Britain (Cangiano et al., 2009; Gordolan & Lalani, 2009), Germany (Elrick & Lewandowska, 2008), Spain (Morales-Moreno et al., 2015), Italy (Bettio et al., 2006), and the Czech Republic (Ezzeddine, 2014).

A migrant in elderly care is most often defined as a person born outside the country of immigration that works in elderly care (Jönson & Giertz, 2013). Carers of the elderly are understood as people who take care of the elderly, keeping them physically and mentally well, but do not necessarily love them (Nicolescu, 2019). In the Australian census, a carer for an elderly person is explicitly defined as a person obliged to provide emotional support and care, and to accompany the person in care (Negin et al., 2016).

The care sector suffers from shortage of workers. The number of people aged over 80 years will increase from over 57 million in 2016 to over 1.2 billion in 2050 in 37 OECD countries. Keeping the current ratio of five care workers for every 100 people aged 65 and older across OECD countries would imply that the number of workers in the sector will need to increase by 13.5 million by 2040. The majority of long-term care workers are middle-aged women. One in five is foreign-born. Elderly care is a pool of women and only a few countries have tried to attract men (Norway and the United Kingdom) (OECD, 2020).

Due to changes in the demographic structure of society, foreign and internal migration, and the decreasing number of multi-generational families living together (resulting in the lower caring potential of the family). Poland is also among countries which experience increased demand for elderly care services (Szukalski et al., 2008). According to the forecasts of the Central Statistical Office (GUS), the number of people aged 65 and over will double in Poland in 2035. This is a major challenge for elderly care. In Poland, as in other developed countries with an ageing population, foreigners are increasingly employed in elderly care. However, it should be emphasised that, due to the influx of migrants to

care for the elderly, the situation of Poland is quite exceptional. Poland is regarded as an exporter of carers of elderly people, mainly to Western European countries (Palenga-Möllnbeck, 2013), and at the same time acts as their importer. Poland has become a new immigration destination for more and more workers, mainly from Ukraine (Fiałkowska & Matuszczyk, 2021) and is an interesting place for research, because it is perceived as a mobility laboratory (White, 2020). This is because, for many years, the Poles have been leaving Poland to work, continuously or periodically, in the old European Union Member States. The parents of Polish emigrants are left to sink or swim, far away from their loved ones. Many of them had to decide on paid care from immigrants. The care does not have to mean direct care, such as washing, administration of medicines, or meal preparation. It is often about everyday assistance, such as cleaning, shopping, and helping in the garden or around the house. If members of the immediate family of elderly people lived nearby and not abroad, they could perform these activities by themselves. Therefore, elderly care in Poland should have a much broader dimension, not limited to direct care. As mentioned above, some leave Poland, mainly for Germany, while others come here, mainly from Ukraine, to work in elderly care.

In Poland, the use of migrant workers in domestic services (mainly from the Ukraine), including elderly care, is a relatively new phenomenon. The care sector is a good entry point into the labour market of the host country in case of a short migration experience of a foreigner as shown by researchers from Warsaw (Górny et al., 2020). There is little research on the role of foreign labour force in elderly care. Domestic services have already been extensively studied (Kindler, 2008; Kloc-Nowak, 2007; Kordasiewicz, Kindler et al., 2016; Lasota, 2008). However, elderly care services is a new subject of research (Sobiesiak-Penszko, 2015; Kałuża-Kopias, 2018; Krajewska, 2012). Moreover, the studies focus only on women migrants working in domestic services and senior care. The presence of migrant men in senior care is a new research perspective (Kubiciel-Lodzińska, 2020).

The aim of the study was to fill a research gap, i.e. confirm or deny the differences between migrant women and migrant men working in elderly care. My goal is to demonstrate that the work of men in senior care has slightly different nature than that of women. The research aim is to prove that there are different reasons for their employment and to show that women and men see their work slightly differently. In addition, a novelty is the fact the research has been conducted in a country where conservative values are still strongly rooted in the host society, including the division of works into feminine and masculine.

The respondents were divided by gender to obtain additional knowledge on the factors influencing the migrations and to determine how they are affected by gender. In particular, the following questions were asked: (1) What are the differences between migrant women and men in the motives for taking up work in elderly care? (2) How does gender of a migrant carer influence their work (scope and type of responsibilities) in elderly care?

The paper discusses selected results of in-depth interviews conducted among 42 immigrants (31 women and 11 men), i.e., foreigners working as carers for the elderly. The study was exploratory in nature. The snowball sampling and the respondent driven sampling (RDS) were used to reach the respondents. It is assumed that elderly care

is provided mainly by migrant women (England & Dyck, 2011; Huang et al., 2012a; Schwiter et al., 2018). Men who work in this sector are a clear minority. However, since the contribution of men to elderly care is inapparent, they seem more interesting to investigate. As the “rebirth” of paid domestic work in some countries, e.g. in Italy, implies re-masculinisation of the sector, the issue is also an interesting area of the theoretical study (Sarti, 2006).

The structure of the paper is as follows: the second section provides a literature review on the elderly service sector, particularly with regard to the contribution of women and men. In the next, the research group and the research method are presented. The following section discusses selected research results. The final section presents conclusions and recommendations for further research.

### ***The role of migrants in elderly care: focus on migrant man as carer***

Helma Lutz describes the care sector in the following way: “the intimate character of the social sphere where the work is performed; the social construction of this work as a female gendered area; the special relationship between employer and employee which is highly emotional, personalized and characterized by mutual dependency; and the logic of care work which is clearly different from that of other employment areas” (Lutz, 2016).

Care services can be divided into two spheres: “caring for” (cooking, cleaning, washing) and “caring about” (emotional support) (Fraser, 1995). As a general rule, migrants, i.e. people who were born abroad and left their country of origin to work as carers in the country of immigration (Da Roit & Van Bochove, 2014) are involved in each of these spheres. However, reducing all forms of housework/household work to the concept of care is considered to be problematic. It is a general term which blurs the distinction between care and everyday activities, such as cleaning. Care work differs from domestic work, such as cleaning, cooking and laundry, especially in terms of the social and moral value (Näre, 2009). It contains an emotional charge and is also called emotional work, in which feelings and empathy are an integral part of work performance (Hochschild, 2012). At the same time, it is believed that care and housework may overlap in everyday practice (Degiuli, 2007). Care and housework also constitute an integral part of care employment of migrant workers. Therefore, in this paper, elderly care refers to both direct care, such as washing and administration of medicines, and everyday activities, such as cleaning, cooking, laundry, help in the garden, or small repairs at home.

The literature focuses on the gendered and exploitative structures of migrant domestic and care work. Theories on expectations of gender roles suggest that women may be more inclined to care (Pinquart & Sörensen, 2006). Housework, including elderly care, is feminised (Manalansan IV, 2006; Yeates, 2004). Similarly, nursing is a profession in which “men are considered to be intruders causing confusion in the system fully controlled by women” (Morgan et al., 2017).

Care is seen as a feminised activity that women perform “naturally” and “with love.” The role of care in the service economy is increasing, but is still undervalued in the

market. Definitions of care are usually based on gender concepts (Jacoby, 2006). Care is considered to be yet another type of duties that women typically perform at home as wives, mothers, or daughters as part of the “gender regime” imposing caring roles on women (Brandth, 2017). Women are more expected to take care of both other women and men. By contrast, care provided to women by men is considered inappropriate if it requires, for example, any nursing care activities (Huang et al., 2012a). Care, especially care provided by both sexes, is profoundly affected by the context of activities to be provided by carers. Nursing activities, such as washing and daily hygiene, do not fit into the concept of masculinity (Isaksen, 2017). Care work is perceived as feminine work, and men have to prove their suitability for the job. Elderly care work is primarily concerned with caring for the body. Carers often have to face nudity of their clients, which is more acceptable for women. They can care for both female and male elderly people. As the study shows (e.g. a study made in Switzerland), there is a common preference to employ women in elderly care (Chau, 2019). In many countries, for cultural reasons, it is not appropriate for a man to take care of elderly women in terms of corporeality (Huang et al., 2012b); believes that the concept of global chains used in the analysis of welfare migration even ignores the role of men, focusing on women and creating feminization of this sphere.

The literature also discusses the role of male migrants in elderly care, perceived as highly feminised, and their functioning in this profession (Hrženjak, 2013; Jonson & Giertz, 2013; Näre, 2010; Näre, 2013; Scrinzi, 2010; Storm & Lowndes, 2019). However, their role has decreased due to the feminisation of migration. In domestic services, men work as chefs, gardeners, or handymen, but are more involved in direct care, including elderly care. Some researchers call this phenomenon the remasculinisation of the care sector (Sarti, 2006). To investigate the employment of men in domestic services, a study among migrants from Sri Lanka was conducted in Italy. The study included both domestic works and care for the elderly. The central issue was how migrants found themselves in jobs perceived as feminine. Since a range of skills, mainly personal ones, required in care work were identified, the study also dealt with the concept of unskilled migrant worker (Näre, 2010). Comparative studies, also in Italy, have shown that men would find it difficult to work in domestic services (including cleaning, shopping, cooking, and caring for children and the elderly) in their country of origin, but agree to do these jobs abroad. In particular, attention was drawn to men working as carers for the elderly. Studies have shown that migrants were often better educated than the people they cared for. They agreed to take up this job because they could receive up to ten times higher remuneration than in their country of origin. Another reason was that they could reduce expenses due to living in. The respondents also believed that their work is “softer” than working in a factory, for example (Bartolomei, 2010). A study carried out by Francesca Scrinzi indicates that the employment of men in care for elderly men is due to the creation of a niche (Scrinzi, 2010). Moreover, migrants with higher qualifications, e.g. physiotherapists, who, for formal reasons, could not work in their profession, had the opportunity to perform the tasks closely related to their profession. They believed that their work is better than cleaning

works, which they considered to be typically “female.” The important task of the carers is to accompany the elderly person, and create a relationship. This makes men feel they do the right job. The study in the United States has shown that the approach of migrants to elderly care is related to religion rather than gender. It has been found that migrants of Jewish origin coming from countries of the former USSR treat it as a profession while the Orthodox see it as doing something good for another person (Solari, 2006).

For analysis of the data presented in this paper, the concept of global care chains was used, referring to “personal links between people across the globe based on the paid or unpaid work of caring” (Hochschild, 2000). It refers to the range of personal connections between people around the world based on paid or unpaid caring work is often cited in the literature. It is about moving care down the hierarchy of gender, class, race and nationality (Isaksen, 2012; Lovelock & Martin, 2016). This concept, developed under feminist economics, is used to analyse not only care and household work but also gender patterns in migrant workers. Due to this concept the outsourcing of care work is a “new international division of social reproductive labour” (Parreñas, 2020). The dual labour market theory was also used, according to which migrants take jobs in sectors perceived as not very prestigious, and work in them is burdensome and relatively low-paid (Piore, 1979; van Hooren, 2012). Also feminist career theories have been used. They can be applied to both women and men. Such variables as socialization and gender can be important in both cases (Król & Ludwicyński, 2006). The work is also located in a stream on “men in women-dominated occupations” (He et al., 2019).

### ***Research method***

The aim of the research was to compare the differences between migrant women and men working in the elderly care sector.

Surveys on immigrants working in elderly care is a huge challenge for several reasons: (1) it is a double-hidden population — foreigners and the families employing them are unwilling to reveal their presence due to the mostly illegal nature of work; (2) it is a rare population (sparse) — work in senior care is not of a mass nature; (3) residing in the country of immigration periodically (temporary migrants, often with short stays); (4) “closed” population, i.e. persons providing 24-hour care for a senior suffering from serious illnesses (dementia, lying person) have very limited possibility of leaving the house (5) in Poland the phenomenon of employing migrants in senior care is almost unexplored, so it is a completely new area of exploration for researchers (there are no even estimates available to show the scale and nature of this phenomenon) (Kubiciel-Lodzińska, 2021; Sobiesiak-Penszko, 2015).

The study used two methods to reach the respondents: snowball sampling and respondent driven sampling (RDS). Snowball sampling is a non-random selection of respondents for the study. At the end of each interview, the interviewer asked a respondent to indicate another person (or persons as the number of people was not limited) to interview on the same subject. However, new respondents were usually searched by interviewers based

on their contacts. Respondent driven sampling (RDS) is a sample selection driven by a respondent (Heckathorn, 1997). It is a modification of snowball sampling assuming the double incentive system. After the interview, the respondent could indicate a limited number of people to be surveyed (no more than two people). The double incentive system consists in rewarding the respondent both for giving an interview and for recruiting more people. Half of the in-depth interviews were conducted using snowball sampling. Other respondents were reached using RDS.

The paper is based on the content analysis of empirical material collected in a qualitative study. The research was carried out in the Opolskie Voivodeship (between December 2017 — May 2018). Forty two in-depth face-to-face interviews were conducted with migrants (women and men) working as carers of the elderly. The qualitative approach is a reliable instrument for researching hard-to-reach groups (Atkinson & Flint, 2001).

The study used a semi-structured interview questionnaire specifying several areas, including the following: description of the respondent, motives for migration and reasons for taking up employment in elderly care, qualifications, the scope of responsibilities, conditions of stay, and the amount of remuneration. The in-depth interviews were conducted in Polish and all respondents spoke a conversational level of Polish. The study was intended to cover both formal care (nursing homes) and informal care (caring for the elderly in their homes). However, in the course of the study, only the respondents working exclusively in the latter sphere were reached. Appropriate ethical permission was obtained from the study participants. The respondents are anonymized to protect their identities.

The interviews were conducted in Polish and lasted about 45 minutes each. The respondents have been working in Opole Voivodeship in different towns. The interviews were digitally recorded, and transcribed. Data was analysed using qualitative analytical methods, primarily consisting of reading and rereading of the transcripts. The approach in data analysis was driven by the interest in potential differences between women and man in elderly care. The analysis of qualitative data was performed using Maxqda. The data was analysed using open and axial coding (Charmaz, 2006; Strauss & Corbin, 1994; 1997). For this paper, interview quotations were translated into English by the author and proofread. For the purpose of this paper, particular quotations which has been considered as relevant for the reader and to show the differences between women and men in elderly care were selected.

### *Sample characteristics*

There is heterogeneous employment of migrants in senior care, i.e. it includes people living with their charges (the so-called living-in) and people who rent a flat and provide care work for hours (the so-called living-out) (Gallotti, 2009) which affects the ability to reach the respondents. For the study purposes, a carer for the elderly is defined as a person who permanently (living-in) or periodically (living-out), e.g. several hours a day or several times a week, takes care of the elderly and their household. The definition is broad because, due to the specific character of migration in Poland, the number of older

people living alone is growing and their families (usually children, nephews or nieces) stay abroad. Therefore, the elderly need help in both direct activities, such as washing, cleaning, or cooking, as well as works around the house (minor repairs) and in the garden. The study covered migrant carers involved in both types of works. This was because, in both cases, the carers had a significant impact on comfort of living of the elderly. Moreover, with their help, older people, living alone, could run a normal life. This broad definition is in line with the concept of caregiving divided into “caring about” and “caring for” (Holstein, 2001). Most of them came from Ukraine. Only two people came from Belarus and one from Russia. Table 1 describes women and men participating in the study.

**Table 1. Respondent characteristics**

	<b>Women</b>	<b>Men</b>	<b>Total</b>
Number of respondents	31	11	42
Average age	32,2 years	35 years	32,9 years
Education			
High-skilled	17	9	26
Low-skilled	14	2	16
Nature of employment			
Legal	13	4	17
Illegal	18	7	25
Nature of living			
Living-in	12	6	18
Living-out	19	5	24
Character of work			
Only work	22	6	28
Extra work	9	5	14

Source: Own compilation based on the research.

In the study, those who are university graduates are classified as high-skilled workers and those who do not have a university degree are classified as low-skilled workers (Iredale, 2016). In the study group, 17 women and 9 men were high-skilled (with higher education, including nursing, physiotherapy and engineering studies), and only two were low-skilled (with no more than secondary education). Eighteen respondents lived in with the older person and 24 lived out. Care for the elderly constituted the only source of income for 28 respondents and additional source of income for 14 respondents. Note that some of those who lived in treated their work as an additional source of income.

They took care of the elderly in exchange for living in and combined their work with other work. The majority of respondents (25 people) worked illegally (without a formal contract). Employment in domestic services, including care services, is usually illegal (Van Hooren, 2010).

## *Study results*

### *Education and qualifications of the respondents*

Most of the respondents involved in elderly care were underemployed. They experienced brain waste, i.e. nurses, physiotherapists, engineers, and economists from the study group did not use their qualifications in their work. In order to answer the research question, the differences in education between surveyed women and men, and the type of education, were analysed. The aim was to determine whether education was in line with the profile of work of the respondents. Education that was helpful in the care of the elderly, i.e. nursing, physiotherapy, and the elderly care training courses, was considered to be in line with the profile. All other types of education were classified as non-profile education (Table 2).

**Table 2. Differences between men and women by education**

	Woman			Men		
	Legal	Illegal	Total	Legal	Illegal	Total
High-skilled						
Profile educated	6	1	7	3	1	4
Non-profile educated	3	7	10	0	5	5
Low-skilled						
Profile educated	0	0	0	1	0	1
Non-profile educated	4	10	14	0	1	1

Source: Own compilation based on the research.

The results in the study group revealed some differences between men and women. Most men who decided to work in elderly care had a higher education. Four respondents graduated in their country of origin in physiotherapy and one completed an elderly care course. It can be assumed that their qualifications were in line with the profile of their work. There were also a slightly more women with higher education who decided to work in elderly care. However, this advantage was not as significant as in men.

The statements of the respondents, both women and men, on education were very succinct. They believed that education does not seriously affect their position on the labour market. They considered the qualifications they obtained in the country of origin



to be insignificant in the country of immigration. The selected statements of women on their education are presented below:

*I have a university degree in pedagogy. I am a kindergarten teacher (R 2, woman, aged 49, high-skilled, non-profile educated).*

*I graduated. I am a nurse (R 19, woman, aged 24, high-skilled, non-profile educated).*

The statements of men were similar:

*I graduated. I am a mechanical engineer (R 1, man, aged 28, high-skilled, non-profile educated).*

*I graduated from dental school in Ukraine. I make teeth [dental prosthetist] (R 3, man, aged 30, high-skilled, non-profile educated).*

*I graduated as a physiotherapist (R 9, man, aged 32, high-skilled, profile educated).*

Note that the respondents with profile education were employed in a legal manner. Other respondents were most often employed illegally. They did not have a contract to care for the elderly, but had a legal residence status.

### *Motives for choosing elderly care by gender*

Among the motives for working in elderly care were the following: work matching qualifications to a certain extent, altruistic motives (willingness to help others), easy way to find a job in the sector (migration networks), market gap. In the areas marked, the motives were slightly different between men and women.

In the area with people with higher profile education (nurses, physiotherapists), no significant differences between the sexes were observed. People with higher education may experience depreciation of qualifications when taking up employment as an elderly carer (Triandafyllidou, 2016). However, the respondents did not raise this issue. Both women and men with training in nursing and physiotherapy believed treat their work in elderly care is, to a certain extent, in line with their education profile. They also felt that their job matched their qualifications. This approach is particularly visible in the statements of the female respondents with profile education. For women with higher education (nursing or physiotherapy), work in senior care was a substitute for professional work, which they cannot perform in Poland due to the need to recognize their diploma.

*I could not find a job in my profession, and I wanted to work in a hospital. It was not always appreciated that I had education and experience in Ukraine. In order to work in a hospital, I would have to finish my studies here, and that's how I started to work with the elderly. For me, it is something similar. I can say that I am a private doctor (R 17, woman, aged 26, high-skilled, profile educated).*

The statements of men with profile education were similar. One of the respondents justified taking up work as a carer in the following way:

*This is because I am a physiotherapist by education. I have worked with these elderly people and conducted physiotherapeutic treatment. And this is what I find most important in my decision (R 23, man, aged 51, high-skilled, profile educated).*

However, there are more differences between the sexes. Women more often pointed out that they were able to work in care because they knew how to do it and what to expect as they previously cared for someone in their family, e.g. a child or an older family member.

*Especially because I have always looked after someone. I used to take care of children, but this is very similar. I feel good about it (R 2, woman, aged 49, high-skilled, non-profile educated).*

Men did not refer at all to their previous experience in caring for family members or performing other activities that might affect the elderly care skills. This may indicate that they do not have such experience. In their country of origin, they did not look after children or the elderly in their families, as traditionally these are duties assigned to women. As immigrants, they agree to do such work because they are paid for it. The men in the study come from Ukraine, where, like in Poland, there is a division into women's and men's responsibilities. Caring for a dependent person is in the society a woman's duty.

In addition, women paid attention to migration network to which they belonged. A motive raised exclusively by migrant women was that they started their jobs as carers because they took them over from other women (friends, family members). Men participating in the study did not refer to this factor at all. Women rely to a greater extent on networks when taking up jobs in senior care. According to the survey, men do not use networks. This may be due to the fact that work in this sector is rather not the target of their migration, but rather they take up jobs because of the lack of other opportunities

*My sister worked in this sector. She looked after an older woman which is now under my care. My sister told me that she had to go to Ukraine. She asked if I would be willing to take up this job. I considered her offer and decided to go for it (R 6, woman, aged 20, low-skilled, non-profile educated).*

*I have a colleague who works in this sector and she recommended me to work (R 31, woman, aged 18, low-skilled, non-profile educated).*

*My mother was very sick. She died aged 69 because she had pancreatic cancer. I took care of my mother. It was a very difficult time after she passed away. And then I went to Italy. I took up this work because everyone who comes here does. This was quite spontaneous. As I said, my friend asked me to take her care duties over from her. She said she needed a replacement and I thought I would try it. I did and I decided to stay (R 11, woman, aged 57, low-skilled, non-profile educated).*

Note that altruistic motives appeared only in the statements of women. They claimed that they felt sorry for lonely elderly people. They believed that their work has deeper meaning: is not only a source of income, but also gives the opportunity to help others. Indication of altruistic motives by women confirms that they may be more predisposed than men to caring work, because they are natural provider of service at home. Furthermore, care work is not considered as “work”, but as “lovework” and is performed as part of the female role (Lutz, 2002).

*I feel sorry for the elderly who are unable to care for themselves and need help from others* (R 40, woman, aged 34, high-skilled, non-profile educated).

*Actually, this is a good profession. We have contact with other people and can give help to someone* (R 21, woman, aged 34, high-skilled, profile educated).

The statements of men did not raise the issue of altruism and readiness to help others. Men pointed out that they took up work in elderly care because they found a niche that is not used in Poland. Their views were more pragmatic. They wanted to sense a situation on the labour market. Men see working as a senior carer as a “normal” job that allows them to earn money.

*Older people need the help of physiotherapists. Poland has many specialists, but nobody takes care of older people. I saw a niche. In Poland, the elderly are neglected by their families* (R 15, man, aged 32, high-skilled, profile educated).

Note that only men raised the issue of salaries and satisfaction or dissatisfaction from them. Women did not talk about money if they were not directly asked about it. They did not refer to financial issues. Men raised this issue quite often, also when answering other questions, not necessarily related to wages, e.g. questions about the motives for taking up work in elderly care. They decided to work abroad and take up a job in elderly care because the salaries they could earn were higher than in the country of origin. Therefore, remuneration may be an “justification” for them to work in the sector perceived as feminised.

*In Ukraine, physiotherapist is not a well-paid job* (R 9, man, aged 32, high-skilled, profile educated).

*I really liked my job as a physiotherapist. However, the salary was far from satisfactory. That is why I decided to go abroad to work* (R 23, man, aged 51, high-skilled, profile educated).

### *The role of women and men in elderly care*

The study has shown that the work of foreigners in elderly care is connected not only with direct care of the elderly (washing, administering medicines) but also with household tasks, such as cleaning, cooking, laundry, and shopping.

The involvement of men in elderly care is not accidental, especially if it is to be provided to other men. It is not uncommon for a family or an older person to deliberately choose a male carer just because he is a man. The elderly men feel less embarrassed when care or rehabilitation procedures are performed by male and not female carers. This means that, in the case of men, gender of the carer/person in care, and not qualifications or experience, can be a decisive factor for employment. This is confirmed by the statements of the respondents:

*He is over eighty. Unfortunately, his muscles no longer work properly. He had a stroke. He tries to walk and I help him with his rehabilitation. His family chose me as his carer because he needs help when he gets up, washes up, etc. He said he would be ashamed to undress in front of a woman (R 15, man, aged 32, low-skilled, non-profile educated).*

Moreover, sometimes it is necessary to employ a man — as indicated by the respondents. Some elderly people lying down on bed require physical strength to be cared for since a woman would not be able to lift them. In this respect, elderly care is sometimes perceived as a work for a “real” man. So men are looking for some explanation why they work in senior care. The indication that this profession often requires physical strength shows that it is not only for women, because they would not always be able to cope with the care of us as a senior. A man is necessary for serious cases.

*[R 9] is confined to his bed and needs constant care. You have to be strong to lift him up. A woman would not be able to do this. (R 9, man, aged 32, high-skilled, profile educated).*

*He is an 80-year-old man after a stroke. He does not walk. I just look after him every day. I help him wash up, prepare the food, do the shopping, etc. I find it really difficult to lift him during washing (R 18, man, aged 27, high-skilled, profile educated).*

None of the women considered their gender to be a decisive factor for employment in elderly care. Women, especially migrants with a higher education profile, mainly referred to their qualifications.

*I am a professional nurse and I know my work. I can give injections. I can administer medicine and examine the patient; this is why they chose me. The person is elderly and has health-related problems, as it usually is with persons at this age. My employers were looking for a person who is a nurse because something can suddenly happen to the elderly woman and then I can give her an injection or pills (R 17, woman, aged 26, high-skilled, profile educated).*

The study group, especially those providing elderly care at hourly rates, had also different responsibilities depending on gender. Men much more often helped out in the garden and home. In the interviews, men more often talked about their duties not necessarily related to the direct care of the senior. On the other hand, they were eager to talk about the duties related to help in the home and garden. They wanted to show themselves as handymen first and then as carers.

*My job is to shop and help out at home and in the garden. For example, today, I have to mow the grass, paint the shed and dig the path. I do not do laundry and cleaning (R 1, man, aged 28, high-skilled, non-profile educated).*

*In winter, I come to fire the stove because the elderly man is no longer able to do this. I also help out in the garden. He still has a small bed with onion and garlic. And my task is to dig it up (R 13, aged 63, high-skilled, non-profile educated).*

*I take care of an older couple. I come to them and do all the stuff. Sometimes I go shopping and sometimes I have something to do at home and in the garden (R 1, aged 28, high-skilled, non-profile educated).*

It should be stressed that the respondents living in also did jobs perceived as feminine:

*Generally, I help to cook and clean up. I do all what is necessary. If needed, I go to the shop by car (R 4, man, aged 30, high-skilled, non-profile educated).*

However, the issue of direct help to the elderly was primarily raised by women. They did not discuss working in the garden or helping around the house. They were employed to deal directly with the elderly and/or their immediate surroundings (flat).

*I have to make food for the older woman, wash her and clean her flat. I come in the morning and help. I cook the food and do whatever she asks me to do (R 6, woman, aged 20, low-skilled, non-profile educated).*

*I have to prepare food for her and clean up at home because she lives alone. I also administer medicines and wash her. I wash her if needed because she is confined to her bed and it is difficult for her to go to the toilet alone. Her age prevents her from caring for herself (R 19, woman, aged 24, high-skilled, profile educated).*

Both women and men emphasised that a carer also has to accompany the elderly, talk to them, go for a walk with them, or even watch TV together. Older people are often lonely and need closeness. This shows that the work of caregivers is based not only on physical assistance to the older person, but also on providing emotional support.

*We also talk. Actually, this is the first thing we do. And we watch TV. This is most important, even more than cleaning. Just watching and talking with this lady (R 41, woman, aged 30, high-skilled, non-profile educated).*

*I spend time with her so that she doesn't feel lonely* (R 27, woman, aged 18, low-skilled, non-profile educated).

*We watch "Wheel of Fortune," "Teleexpress" news, and "The Crown of the Kings." And on Saturday or Sunday, ... I don't know the title — the children singing* (R 42, woman, aged 36, high-skilled, profile educated).

Working as a carer of an elderly person, evokes emotions. The emotional aspect of care work was primarily raised by women. One of the female respondents described how she spends time with the person she cares for. The studies have shown that the task of a carer is also to create a good atmosphere and bring optimism so that the elderly feels good in their home.

*We sing together, just for health. And the massage she asked for. Of course, I will do that for her* (R 38, woman, aged 25, high-skilled, non-profile educated).

## **Discussion**

In the group of the surveyed 9 of 11 had higher education (i.e. graduated). Among the respondents, there were physiotherapists, engineers and a prosthodontist. Among women, there were 17 of 31 respondents with higher education. Elderly care is therefore not an area in which unskilled people take up work, but it often attracts highly skilled migrants who, due to formal or linguistic barriers, are unable to pursue their learned professions. This is also confirmed by studies of (Da Roit & Van Bochove, 2014), who point out that work in the elderly care sector is undertaken by relatively highly qualified persons, including doctors, nurses, teachers, and administrative staff. It is worth noting, however, that in the group of men, work in the elderly care sector was hardly undertaken by low-qualified persons. There were only two such persons in the study group, one of which finished a course on elderly care. Thus, it can be assumed that low-skilled men may find jobs in other industries. For the highly skilled, it is not easy to find employment in line with their education, so elderly care is a sure way to enter the labour market. For people with specialised education, it can be a substitute for working in the profession; for others, it is an opportunity to earn additional remuneration.

In the studied group, both women and men with education consistent with the job profile (nurses, physiotherapists, caretaker of the elderly) were legally employed (i.e. they had employment contracts, one of the respondents was a sole proprietor). The remaining respondents illegally worked as carers of elderly persons.

Research has shown that for men working in elderly care, their education and qualifications are not the only determinants of employment. Sometimes, the key is their gender. The presence of men in elderly care has often slightly different nature from that of women (where education, experience, and personality are more often taken into account) (Cangiano et al., 2009; Ezzeddine, 2014). Research shows that men are usually employed to care for other men because the presence of another man is less embarrassing for an

elderly person. It is not uncommon for older men requiring care to be uncomfortable when a woman performs the care treatments. This phenomenon is exposed, among others, by studies from Italy, which show that the employment of migrant men to care for other men was deliberate (Bartolomei, 2010). Furthermore, the gender of the caregiver becomes crucial when the elderly person (most often a man) cannot move and physical strength is required to cope with daily duties (e.g. helping with the toilet, helping to get up, etc.). This is also confirmed by studies carried out in Italy, which show that in some cases, elderly care can be treated as a job for a “real” man (Sarti, 2006). This argument also appears in studies from Sweden and Canada (Storm & Lowndes, 2019). It is worth noting that as a factor determining employment, gender did not appear in the respondents’ statements.

Based on the research carried out, it can also be seen that women and men differed in their motives for taking up employment in elderly care. In the group of women, a network of contacts and a recommendation by a friend was very often referred to. This confirms that migrant women in elderly care very often operate in the networks that drive migration in this sector. Men did not point to networking as a factor influencing their decision to work in the elderly care sector.

Also, only women indicated altruistic motives as a factor in choosing the elderly care sector. Interactions with the elderly people who need and appreciate care can become more crucial to their satisfaction compared to other job opportunities and can be expressed as a sense of doing something “meaningful.” This factor was noted, among other things, in studies carried out in the United Kingdom (Hussein et al., 2013), but they did not distinguish which respondents — women or men — paid more attention to this factor. These factors did not appear at all in men’s statements.

Men, on the other hand, pointed out that working in elderly care is an opportunity; they saw a gap in the lack of sufficient care system for elderly persons in Poland. They were also the only ones to raise the issue of earnings. Women did not do it. It is worth noting that in the case of some men, their role can be considered as an intermediate between care and “handymen.” This is an interesting phenomenon which makes it necessary to look at elderly care more broadly than just as direct care. Due to the situation of the elderly persons, their loneliness caused by the emigration of their closest family (children, other relatives) made it necessary to hand over some of the work to the migrants because they are no longer physically able to do it themselves, and there is no one to help them. In this sense, they should be considered as part of the care chain. Although the concept of the global care chain emphasises the social and emotional nature of care, typical of elderly care (Tronto, 1995), which is not typical of “handymen,” it may be included in this concept due to Polish specificity. This is in line with the observations of other researchers, who have observed that the phenomenon of “handymen” is in many respects the “masculine equivalent” of the outsourcing of “feminine” domestic work and the emergence of global (mainly female) care chains (Palenga-Möllnbeck, 2013; Perrons et al., 2010; Ramirez & Hondagneu-Sotelo, 2009).

The employer’s demand for labour is an important tool to understand gender employment patterns and mobility of migrants (Mahler & Pessar, 2006). Care work is

most often analysed from the point of view of “female employees and female employers” and focuses on the experiences of migrants — women. Based on the research, some differences between migrant men working in the broadly understood elderly care were noticed.

## *Conclusions*

Elderly care is a job that is often difficult to conceptualise unambiguously, as it can cover many aspects — from direct care of the senior citizen (care, dressing), help with housework (cleaning, laundry, cooking) to help with the widely household chores (shopping, gardening). Working in the care sector, including elderly care, is mainly associated with women: daughters, daughters-in-law, or migrant women. It is less often provided by men, including male migrants. The presence of men in this sector may be highly desirable in the long term. Referring to the question posed in the title based on the research conducted, it can be said that there is a place in senior care for male migrants who would like to work in this area. They may be more present, among others due to the need to look after other older men for whom the presence of another man may be easier to accept. However, the decision made by the elderly family or the senior himself to employ a man for care may result from different reasons than in the case of migrant women.

Migrants fill the demand gap in the market for elderly care services in developed countries with an ageing population, including in Poland. They complement the care provided by families and public institutions. It can be expected that the demand for them will grow, all the more so as the Polish market of elderly carers is understaffed. For many years, Poles have been going to work abroad in this sector, mainly due to more attractive earnings (Spencer et al., 2010). Poland has thus become a place where two international “care chains” intersect (Hochschild, 2012).

It is worth noting that the share of men in the studied group of migrants working in elderly care was relatively high, for example, in the studies conducted in Italy, men constituted slightly more than 12% of the total (Sarti, 2010) and 6% in Australia (Willis et al., 2018). What is important, in the study group, it was found that the majority of the respondents had higher education (there were physiotherapists among them). Furthermore, it was observed that education and qualifications influence the nature of employment and the position on the labour market. People with specialised education worked legally.

The aim of the study was to fill a research gap, i.e. confirm or deny the differences between migrant women and migrant men working in elderly care. The study made it possible to find answers to the questions posed in the introduction. It was found that there are differences in motives for migrant women and migrant men to take up employment in elderly care. The former are more often guided by networks of contacts, their own skills and altruistic considerations, while men tend to look at the pragmatic side of this employment. Also, it was found that in the studied group, the gender of the migrant carer influenced the nature of work and scope of responsibilities. Women were more likely to



work directly on the care of the elderly citizen, and men also assisted in the garden or the homestead. The study, therefore, closes the gap in identifying the differences between migrant women and migrant men working in the field of elderly care. It has proved that there are different reasons for their employment and has confirmed that migrant women and men see their work in elderly care slightly differently.

The conducted research also expands the knowledge on the role of migrant women and men in senior care in a new, rarely studied so far in this topic region of the world, which is Central and Eastern Europe. Countries in this area, including Poland, have so far been perceived mainly as sending caregivers for seniors, primarily to Western European countries. It also broadens the knowledge about the functioning of male migrants on the labour market in the segment perceived as unattractive. The novelty of the article is the fact the research has been conducted in a country where conservative values are still strongly rooted in the host society, including the division of works into feminine and masculine.

It is worth noting that the presence of migrants with education in line with the nature of their work, on the one hand, has a positive impact on the standard of care provided, which is performed professionally, but on the other hand, this phenomenon has negative consequences resulting in the incomplete use of qualifications (brain drain) (Brzozowski, 2010), and in the long run in their loss by a group of highly qualified people. Thus, it is a very undesirable phenomenon from the point of view of competitiveness and innovation of the economy of the receiving country (Bębenek, 2015; 2017). It is a barrier to implementing processes, such as diversity management in organisations (Maj, 2017), which in turns has a significant impact on the competitive advantage of organisations and the economy (Maj, 2020; Sauberer et al., 2018). It is also important to use their qualifications, taking into account the emigration of Polish medical staff (Organiściak-Krzykowska & Kowalewska, 2021).

The limitation of the study is that non-probability sampling methods were used to select the sample. The performed research is their qualitative, preliminary nature. It is not possible to generalise the results. Another limitation of the research is the difference in the number of men and women included in the study. Almost three times the difference in the number of respondents may influence some of the conclusions drawn. Despite these limitations, the study is a useful step do identify the differences between women and men in elderly care. Although the interviewers explained that they do not belong to any government or regulatory body and that they are interested in people's motivation and do not judge it. Their goal was to learn about the phenomenon. In Poland, due to the growing demand for foreigners in the field of elderly care services, the research should be continued to broaden the knowledge concerning, among others, the factors of the influx of immigrants, both men and women, to the elderly care sector, qualifications of foreigners (and possibly raising those qualifications at Polish universities, which could be an impulse for higher education institutions) the wage conditions, employment prospects, support for the legalisation of their employment (Piotrowski, 2019). and the development of employment agencies in this segment. It is very important to determine whether migrant work in elderly care is complementary or substitutionary (Kubiciel-Lodzińska, 2019). Do seniors' families use

foreigners' help or do they pass the responsibility for their loved ones on to them? It would also be crucial to determine the value of the work of immigrants who provide elderly care. In a global context, it is certainly worthwhile to examine the role of men in the care chain and their expectations and plans for taking up employment in this sector.

It is recommended to facilitate the legalisation of residence and recognition of qualifications by persons with higher education in nursing or rehabilitation, enabling them to participate in professional and language courses.

For migrants, working in elderly care is often one of many options, so the nature, flexibility and availability of jobs in this sector can be important. Therefore, the work of foreigners may not be a real long-term solution to the problem of labour shortages among care personnel (Pemberton & Stevens, 2010).

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## ***Urban Commons: Building a ‘Communal System’ of the Future***

### ***Abstract***

An increasing number of communities successfully governing urban commons could be seen as a strong move towards ‘delinking’ from homo economicus myth that still remains at the centre of the capitalist economic assumptions. This paper, theoretical in nature, presents an alternative, a preferred scenario of a future ‘communal system’ as a vision of society built on different values than homo economicus conduct, values that are distinctive for urban commons today, especially in peripheral countries. These are: responsibility, networking, cooperation, caring for others, reciprocity, self-help, continuous learning and sharing. The given three examples of urban commons: Torre David, SE VIOME and Bangkok Noi urban gardens — that illustrate such system in the present — share these values and therefore contribute to social change. Although commons are still at the margins of economic considerations, while corporations through the processes of neo-colonisation dominate the centre, a future transformation into a ‘communal system’ is possible, as posited by the postcolonial theory and the actor-network-theory (ANT)

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discussed in this article. Vision of an economic system, based on the new communal myth contributes to the emerging field of postcapitalist, post-growth theories arising in the shadow of a climate catastrophe and other upcoming crises.

**Key words:** urban commons, delinking, centre and periphery, communal system, social change

## Introduction

Although the seemingly economic order of the world, in which corporations with supply chains all over the globe dominate markets, is established, and local entities are pushed to the periphery, it can be destroyed at any time, as demonstrated by the outbreak of the SARS-CoV-2 coronavirus epidemic (WHO, 2020). Supply chains were broken, borders closed and people isolated from one another, but at the same time huge networks of local, neighbourly support were created, offering help in the form of shopping, walking dogs, physical exercise, all thanks to self-organization, solidarity and communication tools such as online social networking sites. Thus, in crisis, when most world governments have announced some form of 'state of exception' (Agamben, 2008), common goods are budding in a variety of different areas of life, in our immediate local space. There is a variety of definitions of commons in the literature, yet for the purpose of this article I define them (after Ostrom, 1990) as goods or services which are collectively managed, subtractable, non-excludable, although ownership rights to them do not necessarily have to be recognised for the benefit of users/local community. At the same time, it needs to be stressed that theories and models of commons (more specifically, common-pool resources) are different from the models for analysing networks, hybrid structures (incl. cooperatives) (Williamson, 1991) or toll goods (Ostrom, 2005, p. 24), and all these different forms of organization should be distinguished. Commons are becoming a breach in the dominant capitalist narrative of *homo economicus*<sup>2</sup> maximizing its own benefits (see definition and discussion in section three). This article, although it is not focused on people's current activities in response to the pandemic, presents a desirable scenario of a future 'communal system' that would have qualities such as concern for others, responsibility, cooperation and fairness, all of which characterize collectives governing the commons today — those

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<sup>2</sup> In this article I am referring to economy/economic systems (i.e. capitalism and communal system) as Migonolo did in his texts (2009, 2011). However, the concept of *homo economicus* comes from economic sciences, in particular classical economics, and as a model it was a reference point in the works of, among others, John Stuart Mill ('Essays on Some Unsettled Questions of Political Economy' (1874)) or Adam Smith ('The Wealth of Nations' (1776)) (Persky, 1995). This ideal was used and developed in the construction of economic mathematical models, among others by Lionel Robbins in his rational choice theory (1932), which in turn dominated mainstream economics, influencing the formation of modern capitalism as a system (about the influence of the Chicago School of Economics and other neoliberals on the economy — their criticism of planning, proclamation of market liberalization, deregulation, monetarism, privatization etc. — see Skidelsky & Craig (2016)).

that are just emerging as well as those long in operation (examples of which are presented in parts five and six of this article). I focus on the urban context because cities as such have historically been a source of opposition and resistance to regimes, inequalities and injustices, providing shelter and a place to act for those who have the courage to go against the tide. This text aims to reveal the potential of urban commons to contribute to changing the way people think and act, so that by ‘delinking’ (after Walter Mignolo (2011)), they are inspired to (re)define the situation and implement alternatives in the economic system to build an alternative future scenario. The use of postcolonial theory (including Spivak, 1992; Mignolo, 2011) to build a far-reaching scenario based on the activities of collectives governing urban commons is a new contribution to the state of existing knowledge, as it is a unique combination in the context of existing scenario studies. In my paper, the commons operating in the urban realm form the foundation of the aforementioned concept of the future called the ‘communal system’. Such a system is critical for the shaping of social policy, which, as observed, *inter alia*, by Gøsta Esping-Andersen is different in countries with different welfare state regimes (1990). In his theory, the dominant entities effecting the life of citizens are: the market, the state and the family. Here, commodification is a key concept indicating the relationship between a person’s material situation and income received for contract work (on the market) (Balcerzak-Paradowska, 2014; Szelewa, 2016, p. 316). Commons play an important role in complementing this framework by filling the gaps in the provision of goods and services that are not supplied by any of the three identified entities, also eluding commodification. In my concept, the deficits can be huge (lack of housing, food shortage or unemployment) and they are complemented by commons arising in the urban space (see section five). If there are many commons, including social movements — which Fiona Williams calls ‘welfare commons’ (2015) — they can lead to a significant change in social policy (through a change of values and dominant paradigm), further — economic policy — and ultimately transform the economic system as a whole into desired ‘communal system’.

Before this scenario is presented in the third part of this article, there is a discussion in the second section on the division into the centre and periphery as a historical context of political economy. This background is part of the ‘past & futures’ debate (Fergnani, 2019), necessary to understand the aspects of the creation of the current capitalist order — the order from which urban commons depart, plotting the way for the future scenario. The fourth part of the article explains the methods I used — on the one hand, to build the scenario itself (Sardar, 2010), and on the other, to learn and interpret the features of urban commons, which is typical for social sciences. Section five is devoted to urban commons, specifically to three examples that best serve as an illustration of the organization model and are the inspiration for the new order. In the sixth section, the features of these alternative entities are reviewed and juxtaposed in a table for comparison. This section also reviews theories on social change, pointing to the potential for urban commons to contribute to the transformation, based on, among others, actor-network-theory (Latour, 2005). The article closes with a discussion and a conclusion.

### *Centre and periphery — the past*

In the second half of the nineteenth century, Western Europe together with North America and Japan (the so-called Triad) already imposed the capitalistic economic model upon the rest of the world (Toussaint, 2012). The largest collapse of this system took place in the 1930s (the Great Depression) to give way to the Keynesian solutions with the end of the Second World War (Judt, 2010). These following decades brought the demise of the world empires. French, British, Dutch, Italian, German, Belgian and other colonies gained independence and over the years the whole process was strongly supported by the United States of America (USA). Since the USA themselves had very few colonies in the pre-war period, at the end of the 1940s they started to build the economic interdependence of the institutions in which they had a decisive voice, such as the World Bank and the International Monetary Fund. They won the support of the newly formed governments of the Third World countries mainly by providing them with loans and expanding the operations of their corporations there<sup>3</sup>, which dominated local markets (Bakan, 2004; Klein, 2007). Politically independent rulers of the former colonies found themselves again in a system favouring domination, exploitation and control practices, later characterized as neo-colonial (Chomsky & Herman, 1979; Sartre, 2001). These practices could be observed not only in international relations but also in working conditions in national markets, described in more detail in the next section dedicated to, among others, *homo economicus*. The countries of Western Europe also played their role in this procedure by burdening newly emerging governments in the Third World with debts initially incurred by the ousted colonizers. Hence, those countries immediately lost their economic and political sovereignty (Perkins, 2004). This dependency is illustrated in terms of the global economic system which places wealthy countries in the centre, and poor countries at the periphery (Wallerstein, 2004).

The neoliberal economic discourse, which appeared in the mainstream economic thought after the oil crisis in the 1970s, manifested itself in, among others, intense trade and finance markets liberalisation, massive privatizations, markets deregulation and opening for foreign direct investments. The way to successive crises was not long and their number is alarming. Only in the years 1975–1997 the International Monetary Fund had identified 158 financial crises in the economies of both the Global South and the Global North (Young, 2003). The last financial crisis (2008–2012) divided the economic centre further by pushing weaker economies of the Southern Europe (especially Portugal, Italy, Greece and Spain — so-called PIGS, an acronym used in finance and economics (Quiggin, 2012, p. 229)) to the periphery. We also do not know yet what final effects the current coronavirus disease (COVID-19) outbreak crisis will bring in the long run (Phillips & Smialek, 2020). Nonetheless, a crisis is not only a threat but also a chance to establish a new economic order by shattering the illusion of an endless economic growth and the rule of invisible hand and showing the model of social organization based on values other than the rationality of *homo economicus*. This crack in the recent economic order also

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<sup>3</sup> To a large extent due to the popularisation of the container and maritime transport of goods (Reich, 2007).

bolsters the emergence of urban commons when factories collapse and are taken over by employees, or developers abandon investments taken over by families, examples of which are presented later in this text.

This section intended to outline the global context of international relations (division into the centre and periphery) that would allow the creation of activities parallel to capitalist relations that today dominate the world (corporations are in the centre and other types of organizations, on the margins). The use of postcolonial theory — which until now has not been applied to the conceptualisation of commons — paves the way to the recognition that commons can be an alternative to the mainstream economic order in the future. The capitalist relations, based on the notion of *homo economicus*, and the method of breaking off from them mentally ('delinking'), are described in the next section. Using the deductive reasoning method (Girod, 2015), the section also presents the foundations of the future scenario of a 'communal system'.

### ***Delinking from homo economicus — a future scenario***

The *homo economicus* concept, also called 'the economic man' by feminist economists (Waring, 1988; Ferber & Nelson, 1993), is defined as a perfectly rational, egocentric person, guided mainly by her/his own benefits, maximising utility and/or profits. In his publications, Richard H. Thaler calls such people 'Econs' in contrast with 'Humans' — who are prone to cognitive bias, are altruists and very often act irrationally (Thaler & Sunstein, 2009; Thaler, 2015). Although behavioural economics undermined the assumptions of the rationality of choices made by people, and thus the existence of *homo economicus* itself, the corporations and countries from the centre of the modern world continue to act like 'Econs' (Bakan, 2004; Klein, 2007; Varoufakis, 2016).

The capitalist system, better referred to as 'turbo-capitalism' (after Edward Luttwak (2000)) or 'supercapitalism' (after Robert R. Reich (2007)) — the form into which the early capitalism degenerated in the last few decades — is a global, very competitive and innovative system led by large corporations that dominate most industries (Reich, 2007, p. 7). On the one hand, consumer power has been aggregated (collective bargaining by massive retailers), on the other the power of investors grew due to financial markets liberalisation. Washington Consensus, imposed on the peripheries by the World Bank and the International Monetary Fund, based on a widespread liberalisation of trade, privatisation of state enterprises, tax reductions and deregulations of financial institutions (Hurt, 2015) contributed to the popularisation and sanctioning of a system based on exploitation (of people and environment) and violence (Amin, 2002; Silver, 2003; Stiglitz, 2003). Merciless pursuit of money not only indicates that corporations are the personification of *homo economicus*, but — as Joel Bakan diagnoses — that they are psychopathic entities as well (2004, p. 28). If neither customers nor corporations bear the costs of their actions, someone has to bear them. And these are usually workers, communities from peripheral countries, being overworked, toiling for pittance and in inhumane conditions. To quote Gayatri Chakravorty Spivak, global capitalism is

the subject-production of worker and unemployed within nation-state ideologies in its Centre; the increasing subtraction of the working class in the Periphery from the realization of surplus value and thus from 'humanistic' training in consumerism; and the large-scale presence of para-capitalist labor as well as the heterogeneous structural status of agriculture in the Periphery. (Spivak, 1992, p. 67)

In the twenty-first century, being aware of this, we constantly confront the questions: how to contribute to a more equal, just and sustainable economic order of the future? Can all people live and work in safe conditions, with dignity? What must happen for the periphery to move to the centre and for the quality of life to improve for all people on this planet? These are important questions also from the point of view of social policy, which is shaped differently in the countries of the rich global North (the models of the welfare state created, among others, by the aforementioned Esping-Andersen (1990) relate to these countries only) and the indebted global South, which budget spending options are rather limited. Many political scientists as well as economists have tried to point out possible solutions (e.g. James Robertson (2005); Jeffrey Sachs (2005); Holger Rogall (2009); Yanis Varoufakis (2015); Michael Albert (2017)), starting from the changes to the world institutions, through the establishment of new state regulations, to closer control and regulation of labour relations. However, in an interview with Roman Chlupaty on the dusk of *homo economicus*, David Orrell and Tomáš Sedláček state openly that 'every faith we profess, that is also faith in economics, is based on myths' (Chlupaty et al., 2012, p. 16). One of the myths is the existence of *homo economicus*. According to the authors, without myths, neither theory nor forecasts can be developed, thus their existence is indispensable. Since one myth can only be exchanged for another, the 'communal system' proposed by Mignolo (2011) could be the new myth. In order to introduce such a change, one should use visioning, aligning 'individual goals with institutional goals' (Inayatullah, 2013, p. 58). The emphasis should be put on a more primeval idea: on changing the way people think about the environment, on hitherto imposed property rights, and on redefining relations with other people in order for them to be guided by notions other than *homo economicus*. Such an idea, were it to be put into practice (into the system), would heal the breach created by capitalism — and one of the incarnations of that idea are the commons. This concept is best defined by Walter Mignolo's notion of 'delinking' that results from disillusionment with the hierarchy established in the modern neo-colonial world and offers the solutions of transgression against the economic models which have dominated people's minds. He argues that

once you realize that your inferiority is a fiction created to dominate you, and you do not want to either assimilate or accept in resignation the bad luck of having been born equal to all human beings, but having lost your equality shortly after being born, because of the place you were born, then you delink. Delinking means that you do not accept the options that are available to you. (Mignolo, 2011)

These options are now imposed by capitalism and are related to the above-mentioned features of the economic man. In this case Mignolo's delinking from *homo economicus* means a departure from individualism and the pursuit of profit and opting for community action based on concern, reciprocity and justice. Thinking forward, people have the power to organize themselves to create grassroots self-help and solidarity organizations which allow them to survive and prosper. These communities or collectives often take over the governance of spaces and services, usually abandoned private or public, in order to manage them collectively, especially in urban areas (Foster, 2011). Through their visibility (as demonstrated by the examples discussed later in this paper), and their increasing number and size, the actions recognized so far as marginal to the global economy can show that this new way of thinking and acting has the potential for deconstruction and decolonisation of the mainstream economic assumptions, contributing to social change and building an alternative future scenario. As Mignolo points out, 'decolonization, today, thinking decolonially is concerned with global equality and economic justice, but it also asserts that Western democracy and socialism are not the only two models to orient our thinking and our doing. Decolonial arguments promote the communal as another option next to capitalism and communism' (Mignolo, 2011). Yet, Mignolo does not provide a specific vision of such a system, pointing rather to the possibility of many of its types: 'the need for "a world in which many worlds fit" springs to mind as we try to imagine a planet of communal systems in a pluri-versal, not uni-versal, world order' (Mignolo, 2009, p. 31). Were we to build a scenario for the preferred future in accordance with his suggestions, this new system, delinking from the centre of capitalist economy, can be characterized by: diversity, different contexts and environments shaped locally, reciprocity, and ownership perceived as a right to collective use and management of resources of which all the involved people would share benefits rather than a concept of purely material nature. He also indicates that "the good living" — or "to live in harmony" — is an alternative to "development". While development puts life at the service of growth and accumulation, *buen vivir* places life first, with institutions at the service of life. That is what "living in harmony" (and not in competition) means' (Mignolo, 2009, p. 31). Cooperation, a tell-tale sign of such life, is visible now, in a pandemic crisis, as I wrote in the Introduction to this article.

Not only Mignolo writes about the departure from *homo economicus*. Alternatives presented in the literature include, among others, *homo cooperativus* (Rogall, 2009), *homo ecologicus/sustinens* (Daly, 1997; Siebenhüner, 2001), *homo reciprocans* (Falk, 2003), *homo sociologicus* (Dahrendorf, 1973) or *animal spirits* (Akerlof & Shiller, 2010)<sup>4</sup>. Upon examination they all point to the following common features which can be construed as future foundations of a 'communal system': norms and values shaped locally, under the influence and pressure of the environment; long-term goals of a community; responsibility for own activities in the environment and decentralisation, which Mark Buchanan (2003)

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<sup>4</sup> Individual concepts for major schools of economic theory are discussed in detail by Anna Horodecka (2017).

calls 'the small-world phenomenon', or (again) the attitude towards locality, networking and negation of the Leviathan (after Thomas Hobbes, 1982 [1651]); cooperation in various fields and on various scales; caring for others — derived from feminist economics (Waring, 1988; Ferber & Nelson, 1993); a sense of justice and integrity; reciprocity and self-help; continuous learning, including fundamental changes and adaptation to changing external conditions (Elinor Ostrom defines them as 'exogenous variables' (2005, p. 15)); an assumption that mistakes cannot be avoided in actions; and finally, in connection with access to incomplete information, rejecting the idea that acting is and should be based solely on rational premises, oriented towards maximizing one's own benefits. Although these assumptions are very general, and we cannot expect all people to share them, as is the case with the *homo oeconomicus* ideal, they constitute the foundation for building a new system based on cooperation, responsibility, empathy, and the ethics of care (embedded in a new, communal myth), moving away from a purely material approach. These qualities are embodied in the collectives managing common goods, which I elaborate on in section five and six.

### *Methodology*

This article is situated thematically on the edge of two clusters of futures studies, as classified by Alessandro Fernani (2019), namely the 'past & futures' and 'humanity at the limen', collectively considered by the author to be 'core futures research' (p. 115). Both these categories are components of one continuum, which on the one hand points to historical events in order to learn about the limitations, traditions and worldviews that contributed to the construction of current paradigms (described in the second section of this article), and on the other hand attempts to search for economic alternatives to capitalism to avoid/deal with crises (Dator, 1979) (which considerations are presented, among others, in section three). Fernani notes that this combined area is no longer as popular as it once was, and therefore he advocates 'bringing core futures research themes back to fashion' (2019, p. 116). Topics that the author writes about include 'explor[ing] economic and political ideologies in different postcapitalistic futures; or explor[ing] the integral dimension, myth and metaphors behind the futures of work' (Fernani, 2019, p. 116), which I also refer to in this text. The two above-mentioned thematic clusters use scenario methods to a large extent to envision a preferred future(s), or 'to shape desired futures' (Masini, 1983; Sardar, 1999; Inayatullah, 2008). This article is also based on this method while referring to two of the six theoretical pillars proposed by Sohail Inayatullah (2008), i.e. 'creating alternative futures' (the fifth) and 'transformation' (the sixth) (pp. 15–20). In the traditional 'futures triangle' (Inayatullah, 2008, p. 8), with the aim to create a scenario of a 'plausible future' I took into account: the 'weight of history' — recalling the division into the centre and periphery (in the geopolitical and economic sense), the 'push of the present' — emphasizing the role of urban commons, and the 'pull of the future' — outlining the creation of a 'communal system' based on the values listed and illustrated in part six of this essay, in contrast to *homo oeconomicus*

as the competing narrative of ‘business as usual’ dystopian scenario. Using the ‘scenario archetypes’ method proposed by James Dator (1979), I focused on the future presented as a ‘steady state’ in which the functioning of the ‘communal system’ I described would cause the society to be fairer, communities more decisive, placing human values first. At the same time, I used the ‘visioning’ method, which Inayatullah places in the sixth pillar of his conceptual framework (2013, pp. 57–60). In this area, according to the author’s guidelines, I narrowed my script to the preferred future (Inayatullah, 2013, p. 58). As the author indicates, visioning, which is the foundation of the field, is to inspire people, give meaning to their actions, and above all convince them that they have the agency to implement their vision (Inayatullah, 2013, p. 58).

To create a vision of the ‘communal system’, and thus an alternative future that would be anchored in the present (commons qualities presented), I used three case studies (Reinharz, 1992, pp. 164–174; Babbie, 2011, pp. 329–331). The main purpose of presenting these examples in this text is to describe and create the basis for building a more general nomothetic theory (Babbie, 2011, p. 329), based on features of communities (see Table 1), which in my scenario are the basis for construction of the ‘communal system’ of the future. This approach thus assumes that the case studies I am introducing are typical of cases of a certain type (Theordorson & Theordorson, 1969), significant for future events phenomena. At the same time, I am aware of the limitations of generalization from such a small number of cases, and I hope this article will motivate more extensive research on urban commons in the future. Inspired by the research of Gábor Király, György Pataki, Alexandra Köves and Bálint Balázs (2013), using the backcasting method, I pointed to the potential impact that communities governing urban commons could have on future social change. The justification for the selection of these specific cases presented is given in part five of this text, and a detailed description of the tools and research process is provided in part six.

### *Urban commons, three illustrations*

A city as a well-known and clearly defined spacial, social, cultural and aesthetic phenomenon which gathers collective and individual experiences, combines ‘multiple knowledges and ways of being’ (Jeffrey et al., 2012, p. 1249). Within its space citizens undertake collective actions to govern places and services considered as ‘community goods’ or ‘local common goods’, constituting at the same time the urban commons (Foster, 2011; Iaione, 2012). The first analyses of commons examined natural common-pool resources, i.e. joint pastures, water reservoirs, meadows, forests etc. (Ostrom, 1990; Janssen & Anderies, 2007; Kerr, 2007). Yet, research on commons emerging in cities becomes a rapidly developing field of knowledge. Thus far, the theoretical framework for governing common goods, regardless of the space in which they are located, is identical, as I demonstrated upon examples of Polish commons in the article ‘(Re)claiming space by urban commons’ (Łapniewska, 2017). The diverse urban settings, to some extent managed directly by local collectives or communities, are assemblages of not only tangible but also



intangible common goods. These shared urban resources range from local gardens, squares, streets, parks and public spaces (Foster, 2011, pp. 57–58; O'Brien, 2012, pp. 467–468), to a number of services such as care, programming, bicycle repair, cooking and housing (Carlsson, 2008; Federici, 2010). Many collective initiatives move beyond the simple management of goods or services and enter the field of direct democracy, claiming rights to the commons that are associated with people's well-being and not necessarily solely with their material affluence.

Despite the fact that urban communities vary considerably — not only with respect to their purpose, resources and spatial practices, but also in terms of representation, attributes of communities, rules in use and their governance structures — many empirical examples prove that urban communities are able to overcome collective action problems and manage common resources as well as sustain them over time, without the enforcement of an external authority (Ostrom, 1990; Foster, 2011). With no alternatives offered by states or markets in many places of the world, in particular on the margins of capitalist centres, people seize the opportunity to adopt a direct approach to governing goods and services. 'Delinking' proves feasible in this regard, portraying people as bound together, interested in the well-being of others, emotional, and dependent on the natural and social environment they live in, which is exemplified in the first case of an urban common presented here — 'Torre David'. This forty-five-storey skyscraper in Caracas (Venezuela) was abandoned before its completion in 1993, when the main investor David Brillembourg (the tower was named after him) suddenly died from cancer and soon after the Venezuelan economy collapsed (Brillembourg & Klumpner, 2013, p. 88). It was occupied between 2007–2014, then residents were relocated to council flats outside the city, when 'the Venezuelan government has struck an agreement with Chinese investors to restore the complex of buildings to their original purposes' (Fearson, 2014). The building has remained empty until today. In 2007 the first impulse to take over the building was the constitution, changed in 1999, of which Article eighty-two reads: 'Every person has the right to adequate, safe and comfortable, hygienic housing with appropriate essential basic services, including a habitat such as to humanize family, neighbourhood and community relations' (Asamblea Nacional Constituyente, 1999, p. 31). The Emergency Law passed in response to the floods in 2010 paved the way for seizure of empty spaces, including an article stating that 'the plots of land can be subject to urgent or temporary occupation' (Brillembourg & Klumpner, 2013, p. 97). Torre David was an adopted living space serving the community of more than 750 families as a provisional home (Brillembourg & Klumpner, 2013). The conditions under which the mentioned urban common was created can be defined as 'regulatory slippage', that is a situation when governmental supervision of a resource significantly declines for various reasons, including the rational choice of abandonment in case of high costs of property rights enforcement, maintenance or monitoring (Foster, 2011, pp. 66–70). This phenomenon can be illustrated as well by an occupied SE VIOME plant in Thessaloniki. It has become a robust organization despite having uncertain legal and economic status. This first self-managed factory in Greece was re-opened in February 2013 by former employees after

two years of its abandonment. The profile of production has changed from household appliances such as washing machines and dishwashers to ecological cleaning agents. This decision was taken democratically by its employees (for more information read the Biom-metal blog (2018)). This urban common also represents an example of enforcing the right to work and workers' direct response to a complete lack of assistance in the time of crisis. The workers have proved that they can create places of employment for themselves and are able to govern the factory on their own. As these examples show, very often people in cities are dependent on commons they govern (housing, working places, care facilities etc.) or they have specific reasons to advance their common objectives by, for example, gaining access to nature, clean environment, places for gatherings and leisure. Urban gardens developed in Bangkok Noi (BN) and Bangkokkapi in Thailand illustrate this idea. By using a vacant lot in the city local inhabitants, with the support of the Thailand Environment Institute, have created a model of community involvement in environmental management (Faser, 2002). All groups in the community (including women, minorities and the elderly) had sufficient flexibility to articulate their needs in order to assure that the work plan is appropriate for local social and environmental conditions. As a result, long-term green plans were introduced, and gardens started to generate enough income to make the shared strategy self-financing. In addition, the poverty rate diminished, and the pooled funds were dedicated to community projects, demonstrating the possibility of implementing solutions that are not limited to self-interest and individualistic behaviour.

The choice of the above examples was determined by three reasons. First of all, they are located on the peripheries of global economy (Venezuela, Greece, and Thailand) and arose in urban space. Secondly, each refers to satisfying a different need: the right to live in decent conditions, the right to work, and access to nature. According to the Universal Declaration of Human Rights, which includes social, political and economic rights, all human beings have the right to work, to rest and leisure as well as to a standard of living adequate for the health and well-being of themselves and of their families (see Art. 23, 24 & 25). In the case of state and market failure — which situation fits perfectly into the cluster 'humanity at the limen' (Fergnani, 2019) — urban commons can fill in this gap. Finally, the actions taken by communities governing these urban commons are visible (Torre David even served as a set for an episode of the popular 'Homeland' TV series (Nicholson, 2013)) and the solutions can be replicated elsewhere, contributing to the decolonization and creation of a new 'communal system' on a larger scale, thus, an alternative future scenario for all of us. To accomplish that, however, they need to have certain characteristics, different from *homo economicus*, to effectively and lastingly delink from the centre of the corporate capitalist system, as indicated in section three of this text. These features are discussed in the next section, for the presented urban commons, along with an indication of the potential of their contribution to social change.

### ***Characteristics of communities governing urban commons as outlines for a future 'communal system' scenario***

Based on the arguments set out in section three, assuming that urban commons are to constitute a breakthrough, proposing a new way of moving away from the capitalist *homo economicus* to a new 'communal system' of the future, I distinguished eleven areas of shared characteristics for the presented alternative approaches. These include norms and values, susceptibility to the influence of the environment, long-term goals, responsibility for others, cooperation, care for others, fairness, reciprocity, learning and adaptation, making mistakes, and lack of information/bounded rationality. Given these distinguishing features, I constructed a research tool, a short questionnaire, according to the guidelines of social sciences methods (survey research) (Babbie, 2011, pp. 268–312; Creswell, 2014, pp. 155–182). The survey contained fourteen questions relating to eleven mentioned issues, which I gather in Table 1. Ten questions were open, the remaining ones were single-choice (yes or no) or multiple-choice, e.g. questions about cooperation or exerting influence. The questionnaire was sent to Greece and Thailand at the end of August 2018. It was completed by an anonymous Greek employee and sent back in English directly from the official e-mail address of SE VIOME. In the case of Thailand, the survey was sent to the Thailand Environment Institute (TEI), which coordinated the establishment of Bangkok Noi and Bangkokapi urban gardens (for more details see Faser, 2002). Since I did not receive a reply to my e-mail, I translated its content and the questionnaire into Thai. Then I received a completed survey from the Director of Research and Environmental Management Promotion Program. In the third case — Torre David — regardless of the involvement of a number of people who have families or friends in Caracas, I could not find residents who used to live in Torre David before the eviction. I also tried to establish contact with people mentioned in the book *Torre David: Informal Vertical Communities* (Brillembourg & Klumpner, 2013) by their first and last names in the Internet, without success. I wrote to authors and people involved in the book's publication, but my letters remained unanswered. All else having failed, I decided to find answers to the survey in the book itself, using unobtrusive research method (content analysis) (Babbie, 2011, pp. 354–368), therefore in addition to the quotes in Table 1, the pages are given.

Responses from the questionnaires and excerpts from the book, indicating how the described communities understand the introduced concepts and how they define them for the management of the common resource, are gathered in Table 1.

Answers to individual questions are varied and depend on the context. It seems that Greek workers are rather pragmatic, while Thai gardeners are more spiritual. When it comes to quotes about Torre David, the excerpts that best correspond with the features presented in the first column were chosen. For example, no 'mistake' described by the authors of the book could be found (see also the interpretation below), hence a quotation on the general perception of living in this abandoned office building was placed in this cell.

**Table 1. Exemplification of features of communities governing selected urban commons — delinking from *homo economicus***

Qualities	Torre David	SE VIOME	Bangkok Noi urban gardens
norms and values	not organizing large and noisy parties too often, no littering, no instances of domestic violence (p. 145); solidarity of the community, sense of identity (p. 35), security (p. 164)	self-management, direct democracy, participation; equality, solidarity, dignity	preserving the place and natural resources, developing surrounding landscape, showing a way of life in a rapid-changing era; history, social lifestyle, culture
susceptibility to the influence of the environment	to a high degree	to a small extent	to a high degree
long-term goals	‘to establish a strong social network within the housing community’ (p. 31), ‘working towards recognition and legalization’ (p. 33), ‘dignified housing’ (p. 145), ‘continual development and growth’ (p. 331)	creation of new jobs, income boost, local and international expansion	environmental protection, participation, mutual benefit
responsibility, small world phenomenon/ having influence on...	Torre David community, other occupied buildings, local politics, national politics	Vio.Me workers, Vio. Me workers’ families, other (similar) occupied factories	Noi gardening community, other (similar) urban gardens, local politics
cooperation with...	<i>barrios</i> , non-governmental organizations, governmental organizations, private sector	other occupied factories, other occupied spaces/ vacant lots, networks of people and organizations in a similar situation, international organizations/networks, private sector	other urban gardens’ communities, other occupied spaces/ vacant lots, non-governmental organizations, networks of people and organizations of urban gardens, private sector, governmental organizations/institutions

Table 1 — continued

Qualities	Torre David	SE VIOME	Bangkok Noi urban gardens
care of the others	'the residents remain understandably alert and guarded against outsiders' (p. 134), 'improve security along stairs, hallways, and balconies' (p. 209), 'ongoing engagement with the society in which they live' (p. 331)	workers on strike, refugees	meeting the needs of the local people, involvement in the processes
fairness and <i>quid pro quo</i>	'leadership structure is a sequence of concentric circles of influence and authority' (p. 148), 'a mix of bottom-up democratic discussion and consensus that influence the authoritarian decision-making apparatus at the top' (p. 148); rules/norms are written down; there is an internal group to settle disputes	all decisions are taken by the workers' assembly; rules/norms are written down; there is no internal group to settle disputes	appropriate academic counselling, participation, benefits to the public; rules/norms are written down; there is an internal group to settle disputes
reciprocity/self-help	yes; 'together they cleaned Torre David, floor by floor (...) and allocated spaces for each family' (p. 99), 'Gradually, they organized the construction of balustrades and painted communal spaces and private apartments' (p. 99); there is top-down division of work	yes; 'Inside factory's facilities there is the 'Workers' Clinic in VIOME'. A self-managed clinic, which provides holistic and synthetic medical care to VIOME workers, their families and any other citizen of Thessaloniki who wants to participate'; there is no top-down division of work	yes; using the existing resources, periodic updates; there is top-down division of work

**Table 1 — continued**

Qualities	Torre David	SE VIOME	Bangkok Noi urban gardens
learning, adaptation	‘in defiance of the physical limitations of the building, they (residents) have fostered a remarkable degree of social exchange, evident in the disciplined leadership structure, democratic processes, and religious bonds. Despite the insecurity of their habitation, they continue to modify their spaces, improving them to fit the needs of the community and to reach continually for a better standard of living’ (p. 335), ‘we see Torre David as an arrival city, a laboratory for exploring and testing a utopian potential’ (p. 364)	‘We changed the former production of constructive materials to natural and ecological detergents.’	adjusting the size of the plots to urban conditions, taking into consideration shades of the houses and canals
mistakes	‘The high-rise is (...) a contradiction in itself: a success of sorts within a failure; a barrio that is also a gated community; a hierarchical, authoritarian anarchy.’ (p. 135)	‘Of course, we have made a lot of mistakes during all these years. The only way to avoid or surpass them is the reliance on the collective processes, such as workers’ assembly.’	‘No, because the tranquillity of the city garden will preserve the city’s environment. Carbon absorption reduces the surface temperature of urban streets.’
incomplete information, bounded rationality	no – there is no access to full information, since ‘the residents have received no formal recognition from the owners’ (p. 30), which resulted in eviction and relocation in the end	yes – full access to information	no – there is no access to full information – and the future plans are created by the community, the governmental office with relevant agencies and external co-sponsors

Sources: Based on questionnaires completed by representatives of SE VIOME and TEI and the book *Torre David: Informal Vertical Communities* (Brillembourg & Klumpner, 2013).

In all cases, the proclaimed norms and values correspond to the local conditions, they are focused on protection and cultivating the resource on the one hand, and on the community, inclusion and active participation of members on the other. In two cases, the environment has a decisive influence on the condition and future of the urban common (TD and BN urban gardens). All communities, however, formulate long-term goals that oscillate around, above all, improving the quality of life of their members. In order to achieve the objectives listed in Table 1, the communities cooperate in various fields and with different entities (locally and globally), while those more sensitive to external shocks are closely related to governmental organizations. All communities surveyed feel responsible for the local inhabitants and try to exert political influence in their own favour, as well as to help other communities in a similar situation. It is related to care of others, mostly of members of the community (and in the case of Greeks — also for refugees). Depending on the style of organization, the communities are more or less formalized, whereby all members have clear sense of justice and integrity. In all cases, the rules are written down and followed (sanctions), and only SE VIOME workers do not have a special group to settle disputes and their work is not imposed from the top. The activities undertaken by the analysed groups are based on the mutual help and solidarity, which in turn are necessary for the continuous adaptation to changing conditions in which commons are embedded, which will also become a critical feature for survival in an era of rapidly changing climate. Continuous learning, however, is also associated with making mistakes, though only SE VIOME employees were willing to admit this. It can be assumed that the authors of the book about Torre David, for whom it was so difficult to gain the trust of the residents, did not want to write negative or critical remarks about the community, or did not get such information. In the case of urban gardens — due to some mystical connection of this community with nature that emanates from the survey (e.g. using terms 'sacred plants' or 'society's important resources') — it seems that establishing urban gardens is not associated with any controversy and is not in any way problematic in Bangkok. Finally, in both cases (TD and BN urban gardens) — which, according to the interpretation above, are similar to each other due to the uncertain status of their urban commons — access to information is not full, unlike SE VIOME, which probably negotiated stable working conditions as a cooperative. To summarize, the results of the survey presented in Table 1 indicate that all three urban commons have the characteristics specified earlier, and thus are emblematic of a 'communal system' initially outlined by Mignolo and developed in this text by adding other characteristics common to non-*homo economicus* notion. Thus, these urban commons can be an inspiration to other entities (also those operating in the centre, not only in the peripheries) for the future, to implement a 'communal system' scenario, perceived as the new paradigm of actions, based on the qualities listed above.

The features presented in Table 1. constitute a new approach to commons, different from previously used models of external and internal analysis of the examined cases (Scharpf, 1997; Ostrom, 2005; Hagedorn, 2008). They point to specific guidelines related to governing common resources, which can be a contribution to social change, infiltrating from the margin to the centre. Yet, for this transformation to take place, there is a need

for theoretical tools that show the paths to be pursued. The article ‘Models of (future) society: Bringing social theories back in backcasting’ by Király et al. (2013) served as my theoretical inspiration. Using backcasting method to ‘elaborate alternative future visions of society’ the authors analysed four models for understanding society and social change (Király et al., 2013, p. 21). Backcasting method, unlike forecasting, does not rely on historical data to predict future events, but begins with sketches of the vision of the future to define relevant determinants in the present and posit the approach of bringing about this future state (Robinson, 1990). These four models are: structural functionalism, conflict-theory, symbolic interactionism and actor-network-theory (ANT). Building on their study, I try to find the most appropriate theory that would include the definition and meaning of urban commons and their potential impact on the future social change. Although the first two models are based on values such as cooperation and fairness, which are also included in Table 1, it is because they relate to universal changes on the macro scale (they are not sensitive to local nuances — the essence of which is indicated by Mignolo) they will not serve to emphasize the role of commons in creating the future social order. In addition, structural functionalism assumes that change is unlikely to happen, because most of the time we just adapt, and conflict-theory is primarily focused on sudden, revolutionary changes. These are not visions of the future which urban commons might be a part of (especially the three illustrative examples). The other two paradigms, interactionism and actor-network-theory, refer to the micro scale and are dependent on the context in which people (and in the case of ANT — also non-human beings and objects) interact. The new institutional economics — is closer to symbolic interactionism. This model assumes that ‘norms and rules can be and often are renegotiated and reconstructed in each social situation’ (Király et al., 2013, p. 23), and institutions in the new institutional economics such as norms, rules and common strategies (Crawford & Ostrom, 1995; Vatn, 2005) guide actions that contribute to the creation of a future order based on common values (in the case of governing urban commons). That is why the local context, as well as the diversity of ‘actors’ in the ‘action arena’ (after Elinor Ostrom, 2005), are so important — these values are shaped in and by them. Here, the ANT adds value, emphasising the role that material things, elements of the environment, or technological inventions play in shaping the human environment and thus affect people themselves as well. Urban commons, as specific physical goods, or services (outside private/public duality and existing in a legal limbo, as mentioned earlier) that are jointly managed also affect the people who manage them (e.g. they are willing to take the risk of losing these goods in the future in spite of legal changes, or they defend these goods in the name of higher values — e.g. the way Hindu *Chipko* movement defended trees (Shiva, 1988)). According to Bruno Latour (2005), this heterogeneity principle, which also applies to the abovementioned commons, has a huge potential for change. According to the author, each new element of the network (composed of many entities that make up our reality), or changing one element, affects the position and nature of other elements of this network and has the power to reconfigure it in its entirety (and thus the core of the capitalist system discussed in the beginning of this paper). Therefore,



according to the ANT paradigm, communities managing urban commons, despite their position on the margins, have the potential to influence the reconstruction of the centre towards a 'communal system' and to start the process of building a better future for everyone. Questionnaire respondents confirm precisely that sort of vision. SE VIOME representative, in response to a question about the potential impact of their plant on social change, replied: '[w]e try to contribute, as a living paradigm of self-management, to the construction of an economy beyond state and capitalistic market and a society of solidarity, equality and dignity.' Bangkok Noi urban gardens community declared their openness to new ideas regarding further 'design of green spaces development' in which they will participate. The vision of green cities is not new (see e.g. Ebenezer Howard's garden city concept (1898)). Is it perhaps more prudent, however — instead of planning urban spaces from scratch, as envisioned by Howard — to transform the existing ones, following the example of BN urban gardens? The issue of radical renewal is also raised by the authors of the book about Torre David: '[w]hether the Torre David model can be applied elsewhere is a question of topical importance, especially in light of the increasing public interest in issues surrounding the conversation and adaptive use of existing buildings in industrialized nations' (Lepik, 2013, p. 33). Torre David is perceived as a trigger of change: '[t]he process of perpetual change makes Torre David singularly useful as a framework from which the future of urban architecture can emerge' (Schlueter et al., 2013, p. 351). And at last '[w]hat was originally regarded as a merely temporary aberration or deviation from the norm has since become so widespread in so many cities that it no longer appears to be the exception. Informality stands for flexibility' (Schmid, 2013, p. 386). The alternative, in the form of building of a 'communal system' scenario to which communities governing urban commons contribute, is not so far off. The approach of consumers and producers is clearly changing, as in many countries more and more of them refocus their attention to, for example, environmental protection or ethical production, as exemplified by the popularity of the fair trade certificate (Fairtrade, 2018). It is 'trendy' to support local products (beneficial for, for example, SE VIOME), reduce food miles by locally growing and buying vegetables and fruits (beneficial for, among others, Bangkok Noi urban gardens), or proclaim acceptance for occupying empty buildings that guarantees a better quality of life for their residents (Torre David). In the future, when economies are no longer growing (Raworth, 2017; Hickel, 2020), not only the abovementioned, but certainly many postulates of 'degrowth' will find recognition (see Kostakis et al., 2015; Kallis, 2018) and commons — constituting a network-transforming key element in the ANT paradigm — will find themselves in the absolute centre of reflection on the future economy.

### *Discussion and directions for further research*

Presented in the previous section, the actor-network-theory assumes interaction between living and non-living entities in networks, to which both communities and the described urban commons belong. These relations have not been investigated yet and thus constitute one of the directions of future research on urban commons. In

addition, it should be acknowledged that the success of a collective action depends on many other variables typical of actors of different cultures and societies. These actors can have a dissimilar status in their communities depending on their gender or other inborn features or qualities, which might lead to disparities between their members and exclusions. Communities managing urban commons as a model of social organization should be sensitive to these issues. Accordingly, subsequent studies should include a diversity perspective as a more complete description of determinants and conditions of human lives in urban agglomerations today and in the future.

Coming back to the discussion about the aforementioned ‘regulatory slippage’ (Foster, 2011) — the (lack of) legal framework in which commons function — the communities are accompanied by persistent uncertainty related to the lack of recognition of the property rights to the resources in use. The work of local communities that govern commons should therefore be recognized in the macroeconomic account and stable legal framework should be created for their effective and long-term operations. This could be achieved through, for example, recognition of acquisitive prescription or permanent lease. It is also a direction of potential further research — and perhaps a treatise — for lawyers, for whom the model can be, among others, the United Nations Declaration on the Rights of Indigenous Peoples, of which Article twenty-six reads: ‘1. Indigenous peoples have the right to the lands, territories and resources which they have traditionally owned, occupied or otherwise used or acquired’ (UN, 2008, p. 10). At the same time, it is worth mentioning that the examples of communities given here have also taken steps to legalize their statuses. Torre David and SE VIOME evolved into cooperatives, that is formally into private enterprises, while Bangkok Noi urban gardens were created in cooperation with two non-governmental organizations: the already mentioned Thailand Environment Institute (TEI) and Canada’s International Centre for Sustainable Cities. Thanks to this, they had all the better bargaining position when it came to negotiations with the authorities and other organizations from their external environment. However, these efforts did not regulate their rights to the resources they use(d) (the office tower, the abandoned factory or the land), as the eviction of TD demonstrated quite clearly. The debate on commons should not be limited to the property rights only. As this article indicates, these common goods are governed by communities that rely on certain values and design specific institutional frameworks (the norms, rules and common strategies mentioned earlier) and contribute to social change. Thus, commons are not just a ‘transitional form’ of shared resources. In the state-of-the-art, in particular in relation to natural resources (Ostrom, 1990; Ostrom, 2005), the studied communities did not change the nature of the governing common-pool resources (CPR) organization or the formal status of these goods, yet they were able to remain stable and sustainable over a long period of time (Ostrom, 1990; Carlsson, 2008; Bollier & Helfrich, 2012; Frischmann, 2012). Therefore, Elinor Ostrom, among the ‘[d]esign principles illustrated by long-enduring CPR institutions’, points to ‘[m]inimal recognition of rights to organize’, which she describes as ‘[t]he rights of appropriators to devise their own institutions [which] are not challenged by external governmental authorities’ (Ostrom, 1990, p. 90). This postulate is in line with the solutions presented at the beginning of this paragraph (e.g. lifetime lease). Ultimately

— which observation, I hope, will contribute to further discussion and research on the subject — are values represented by commons, non-governmental organizations supporting them, and cooperatives not dissimilar? Is really the form of collectives managing shared resources that significant for the scenario of the future 'communal system'? These are the same communities, the same people who govern these goods that are the subject of social change. These stakeholders stand all in opposition to the centre dominated by corporations with its myth of *homo economicus*. A coop-commons alliance as the core of collaborative, participatory and sharing economy is a great example of such cooperation (see e.g. activities of such organizations as La Coop des Communs, Confrontations Europe, P2P Foundation, SMart, Ouishare, Cecop (Alix, 2016)).

Another issue that I referred to in the article is the nexus commons-social policy. There is a lack of empirical research on the inclusion of commons in social policies and, on the contrary, the impact of social policy on the setting up and functioning of commons in different countries (e.g. corresponding to Esping-Andersen's models (1990) and their more contemporary variations (e.g. Lindbeck, 2006; Beblavy, 2008; Güler, 2019)). I hope that this topic will get extensive research in the near future. As for the conceptual value, few texts are published only that point to the importance of the values of commons for shaping social policy (e.g. Lohmann, 2015; Williams, 2015), pointing to inspiration by grassroots and resistance movements and the need to build 'conceptual alliances' for future society. It is a good starting point for further discussion and research on commons and their (positive or negative - as was the case with non-governmental organizations (Reimann, 2005; Polman, 2010)) role in shaping social policy. Next issue discussed in this section, which is also important in further debates on the centre and the margin, is the transformation of the dominant capitalist structures — the corporations themselves. By carefully observing the margin, they profit from values and behaviours that are initially considered as 'alternative' (as described, among others, by Naomi Klein in the book *No Logo* (1999)). However, thus far this does not change their *modus operandi* based on the logic of *homo economicus*. Due to the rapid global changes (also in the geopolitical structure), as well as the growth of peripheries, whose expectations regarding the quality of life are increasing, further research in this area is necessary. Certainly, technological progress, i.e. Industry 4.0 (Roblek et al., 2016), will also change the centre-periphery relationship, as well as affect our daily lives in cities. These issues, however, will be the subject of research for many scientists in the near future.

Finally, in this text I present a combination of Walter Mignolo's concept (scenario of the future 'communal system') with examples of the three communities governing the commons. These communities have the features described in Table 1, which correspond to the vision of Mignolo, but on this basis we can only envision preferred scenario of the future. For its realization not only 'delinking' is needed but also appropriate stimulation and regulations (i.a. by governments). Of course, other possible scenarios can be quite different (including black scenarios, e.g. based on the continuation of 'business as usual') and dominated by other values. This article was meant to point to the existing examples, which, combined with the presented values, can help to improve the quality of life and create a more equal world for all of us in the future.

## *Conclusions*

Nowadays, the growing number of communities governing urban commons could be seen as an opportunity for decolonisation from the current economic world order. This could be achieved by relying on the concept of ‘delinking’ proposed by Mignolo. This notion calls for searching and creating alternatives, which undoubtedly should include a diversity perspective. Because the opposition to capitalism has an urban character and cities offer space for gatherings and refuge to activists as well as alternative lifestyles and subcultures (Castells, 1983), urban communities governing urban commons can play a vital role as an example of an alternative social organization and have the potential to bring about institutional change in local common spaces and services, becoming the foundation of the desired future scenario. The future ‘communal system’, based on qualities such as solidarity, equality, dignity, fairness, reciprocity, cooperation, care and long-term perspective orientation — which is the way I suggest in this text (see Table 1) — is a step towards a future based on values other than the current paradigm of *homo economicus*. The current crisis related to the spread of the SARS-CoV-2 virus and the looming climate crisis indicate the need to create a new myth to lay the foundations of a future economic system based on it, taking into account the limitations of the planet (and the need to curb economic growth) as well as values that are meaningful to people (and other species) and do not just serve the purpose of multiplying capital. As it is emphasized in this article, urban commons can contribute to social change and shake the foundations of the current order by moving from the margin to the centre. Latour points to this possibility in his actor-network-theory, where one element of a network (an urban common in this case) can destabilize and change the entire network. Yet, to solidify the ‘communal system’, as Orell and Sedláček suggest, perhaps a stronger crisis is necessary (could that be current COVID-19 pandemic?), so that the new, communal myth can overcome the general consciousness. The myth that will allow for permanent ‘delinking’ from *homo economicus* and for appreciating life in a future communal society whose tone is set by urban commons. The future is now?

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