Welfare, Church and Gender in Eight European Countries

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Welfare and Religion in a European Perspective

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Introduction

NINNA EDGARDH BECKMAN

Welfare and religion in a European perspective is a project involving eight European countries. It is based in Sweden, at the Uppsala Institute for Diaconal and Social Studies (Uppsala University/The Diaconal Foundation Samariterhemmet) and led by project director Anders Bäckström. The aim of the project is to analyse the function of the majority churches of Europe as agents of welfare within the social economy. The role of the churches is analysed from a sociological point of view (coordinator Per Pettersson), from a theological perspective (coordinator Thomas Ekstrand), and with regard to gender (coordinator Ninna Edgardh Beckman).

Methodologically the project builds on case studies, carried out in a medium-sized city in each country. Through an in depth study of the majority church in the respective local setting, knowledge will be accumulated on different aspects of the church’s role as welfare agent. Each case study will document both the services provided by the local church, and the activities of the church in forming values and public opinion. Cooperation between different agents will be of special interest. The study will take note of the attitudes of both representatives of (public) authorities, and the population as a whole, towards the role of the church. Special attention will be given to theological and ethical statements and positions taken by the church. Within all areas the significance of gender will be observed.

This is the first working paper published within the project and already marks a step forward. Researchers from the eight countries sketch the respective national backgrounds concerning the welfare system, the majority church and characteristics and policies concerning gender. An image emerges of a Europe experiencing rapid economic, social and religious changes, all of which have a direct influence on welfare provision. Social need has not disappeared in Europe – this is obvious from the texts – but it has altered in nature. Prolonged unemployment, immigration and aging populations are issues which challenge welfare systems and provoke new forms of exclusion. Likewise changes in family composition and gender roles challenge traditional models of bread-winning and the provision of care. The different majority churches find themselves deeply involved in these changes. How they are affected varies, however, depending on their different historic roles in the shaping of the welfare system and in the formation of gender roles.

The eight national portraits involve four major types of European welfare systems; the Nordic social democratic, the British liberal welfare state, the Continental conservative/corporative model and the Southern European type (sometimes included as a variant of the Continental model). In an introductory overview Eva Jeppsson Grassman discusses typologies of welfare regimes in relation to ongoing social change.
The national portraits involve five major church traditions, the Nordic Lutheran traditions, the German Protestant traditions (Lutheran/Reformed), the English Anglican, the Catholic (Italy, Germany and France), and the Greek Orthodox. In spite of their different historic roots, they share the experience of being church in a secularised European society. In each case they represent a majority of the population (in the German case this holds for the Catholic and Protestant traditions together). Each national/theological tradition, moreover, has its own way of dealing with the situation, including its relationship to public authorities and to the welfare system. How this is done is explained in these articles.

Finally the texts reveal the importance of gender in how welfare is organised and the role of the church in relation to this. Women are the major providers of social care within all the eight countries, though they do this in different ways. In the Nordic countries care is primarily organised as paid work within the public sector. In Italy and Greece it has been organised mainly within the context of the family. This, however, is being challenged for a number of reasons. All the countries involved have some kind of legislation on gender equality. However, the scope and impact of the legislation – and the rhetoric that lies behind it – varies from case to case: a fact which is apparent in what follows.

The aim of the volume is to provide a description of the context in which each case study is situated. The context will influence the way that the enquiry is constructed; it will also be taken into account when the data are analysed. The researchers have started their work by providing this background description, based on literature and statistics within the fields covered. The texts were presented at a working conference for the project at the Institut Catholique in Paris in May 2004. A preliminary description of each case study was included at this stage. This section has been omitted from the current versions and will be developed instead in the reports from the case studies due in 2005. Occasional references to the planned case studies occur, however, within the texts and sometimes a more detailed description is given of the situation regarding welfare, church and gender in the area where the case study is situated.

The coordination group in Uppsala have provided guidelines for the content of the background descriptions in the form of a set of questions concerning the three areas welfare system, church tradition and gender organisation. With one or two exceptions the texts are centred on three headings, each encompassing one of these areas. Every researcher has however been free to omit or add areas specific to the national context. One example is the rather detailed description of the French concept *laïcité*, which required particular elaboration in order to be understood in a non-French context. The French text also introduces the particular role of Roman-Catholic religious orders in social work, a dimension which has no parallel in a Lutheran country like Sweden.

Within the framework given the texts vary in scope, style and length. Due to finance and other commitments the amount of time the researchers have been able to devote to the reports has varied. Some of the researchers have been working full time on the project, while others have had to do this in between other tasks. Several
of the younger researchers have completed their doctoral theses during the period. Some have had the great advantage of writing in their mother tongue. The variety of academic traditions represented in this interdisciplinary and international project has also left its imprint on the style and emphasis of the descriptions. Any major gaps in the reports will be made good in the case study reports.

The English has been checked by Martha Middlemiss, who is writing her doctoral thesis on the English case. She has corrected our errors, but also shown great tolerance towards our respective language traditions – nuances that we might have chosen to eliminate in a more final report. Special thanks are extended to assistant project director Grace Davie, for her advice on both language and content, and to my collaborators in the coordination group, Thomas Ekstrand and Per Pettersson. The final editing of the report has been my pleasure and duty. The report is to be presented as a working paper for the conference on Welfare and Religion in a European perspective in Uppsala, 20–21 November 2004 where the issues actualised in the reports will be aired and the analytical process of comparative research will begin in earnest.
Few questions have attracted more attention during the past 15 years than the welfare state – its “crisis” and its chances of surviving in a late-modern era and in the economies of our time. “Welfare states in transition” has become a key element in a rhetoric implying that the welfare regimes in advanced Western societies face important challenges today: such as needs for national adaptation to globalisation, the current demographic situation (with ageing populations and low fertility rates), the changing economic role of women, in fact challenges related to with the very fundaments of the welfare states. Whatever welfare solutions were chosen – and they vary in the different European countries – the fact remains that the welfare models in most West European countries were created in a historical context with preconditions which may no longer be at hand. Many European countries have, in the past 10–15 years, seen cuts in public expenditure and stricter welfare priorities, as ways to face current pressure on the welfare systems. New geographies of vulnerability have, as a result, been added to old ones.

“The welfare state in transition” discourse, furthermore, does not only concern the financing of the welfare state, and degree of coverage, but also the organisation of it as well as provision of welfare services. Many West European countries have in the past 15–20 years gone through important changes in regards to welfare organisation and provision. Decentralisation and de-regularisation of welfare are patterns that are often seen to go hand in hand. In several of the countries included in the research project of this book more or less far-going decentralisation has been coupled with new arrangements of welfare provision with increasing importance for non-profit and for-profit welfare providers. With various patterns this pertains for instance to France, Great Britain and Sweden.

The concept of privatisation generally implies that services, earlier provided by the public sector, have come to be taken over by the market, i.e. by for-profit actors. Trends of privatisation in this sense can be seen in various forms in several European countries, mainly dated to the 1990s. The concept privatisation is, however, rather ambiguous. In principle it can also include an increased focus on contributions from all agencies/actors who are not the public sector, that is to say the voluntary sector, church, family as well. These varied actors traditionally have different levels of importance in the European welfare regimes and possible patterns

1 Esping-Andersen 1996.
of change therefore take as their starting points different contexts of welfare regime and are carried out with different representations.

In connection to the trends and patterns that have been described, a new element in the rhetoric about welfare states in transition has appeared: in the 1980s, and with increasing importance in the 1990s, in international debate and research, the notion of the four sectors of society was launched broadly and articulated, with a particular interest the respective roles of the sectors in welfare provision. In this system, the voluntary sector is the sphere of society that is not the state, the market or the family. It had often been overlooked earlier in scholarly research. What was new in international welfare research at this time was that the voluntary sector ‘was made visible’ though research and that boundaries between the four sectors of society were articulated, highlighting the division of responsibilities. In relation to this, patterns of paid and unpaid work in welfare service provision also attracted new research attention, notably the unpaid volunteer work in associations and the informal care carried out by families for old and frail relatives. In sum, in the 1990s who should finance, who should organise and who should provide welfare – questions which have always been central in welfare discourse – were brought to the fore in a new manner. The church does not go untouched by trends of transition in the welfare state. Whether it has a well-established role as provider of welfare services, as in some countries (particularly in Continental Europe), or a more complementary role in welfare, as in the Nordic countries, the general pattern is that new demands and new welfare situations entail changing roles for the church. Some churches have also, in the past decades, developed their own discourse more specifically focusing on their role in welfare.

In connection with this, an important issue is in what sector to place the church – in the State sector or the voluntary sector. The fact that there is no single or comprehensive answer to the question can serve as one explanation of the fact that the church’s role in welfare received so little academic attention during the boom of voluntary sector research with connections to welfare which we have seen over the past 15 years in Europe. On the other hand the church is not regarded as a welfare actor in ‘typical European welfare state research’ either, as a read through of a number of the central works within welfare state research, which were published at the end of the 1990s and beginning of the 21st century shows. The study of the church’s role in welfare, which is presented here, therefore fills a void in welfare research.

The picture of “welfare states in transition” which has been presented, is one of the points of departure for the WREP-project on which the chapters of this book are built. The book constitutes a background and a context to the project, which aims at analysing the function of majority churches as agents of social welfare in a comparative European perspective and within traditional and transitional welfare

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3 Anheier & Salamon 1994; Pestoff 1991; see also Blennberger 1993.
5 Gaskin & Davis Smith 1995; Jeppsson Grassman & Svedberg 1996.
panoramas. In the following chapters collaborators from the eight participating countries present the national context of welfare in which the majority church of their country exists.

This introductory chapter aims at presenting an overview of the key concepts and issues of what can be called the social welfare field, giving a frame of reference and some tools for the continued reading of the coming chapters.

Welfare and welfare state

Welfare is about the good society and the living conditions of the citizens. In the Scandinavian tradition welfare is often defined as “the individual resources by means of which members of society can control and consciously steer the direction of their own lives.” It has to do with living conditions in areas such as economy, health, employment, social relations, housing, security and political resources. These areas are usually considered to be central in welfare, whether they are studied as resources or in terms of fulfilments of needs. Welfare systems have to do with basic principles such as coverage and eligibility – who qualifies and to what extent the individual is compensated for risks to which he/she is exposed through life within the mentioned welfare areas.

The concept of welfare is, however, not always clear and it is used with different connotations in various situations. Allardt made a famous typology of the welfare concept based on three categories: to have, to love and to be. The two last categories have to do with the subjective dimensions of welfare and with “quality of life” – a concept which is often used as a complement or sometimes contrast to material living conditions. They refer to social relations – love – and to existential dimensions – sense of whole and meaning and the possibility of achieving existential life projects. With such wide definition of the welfare concept we depart from what are usually considered to be the core areas of the welfare state. Yet in some welfare debates in the past years, notably in Scandinavia, it has been argued that the concept of welfare in late-modern, post-materialist societies takes on other meanings than before. Furthermore, welfare is often too narrowly interpreted from a “state perspective.” In order to understand the welfare provided by churches and voluntary organisations in many countries, for example, a wider definition of the welfare concept is needed. These subtler dimensions of welfare are usually not addressed in comparative studies of welfare states.

The concept of welfare state has a strong connection to the post-war history of many European countries but the foundations of welfare states were created at the end of the 19th century. Important and crucial breakthroughs for the modern wel-

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8 Palme et al. 2002.
10 Allardt 1975.
Welfare, Church and Gender in Eight European Countries

Welfare state were made in the first decades of the 20th century.13 Exactly what is meant by “welfare states” is not always clear. Esping-Andersen argues that welfare state must mean something more and something other than “whatever menu of social benefits a state happens to offer.”14 The welfare state as we understand it must be viewed as “a unique historical construction, an explicit redefinition of what the state is all about.” This specific historical construction had its strongest phase of development between 1930 and 1960 in many European countries. It has, after that, been refined and elaborated during the following 40 years. In some countries, the years between 1950–1970 have been spoken about as “the Golden Age” of the welfare state.15 A problem today is that the welfare state construction is built on assumptions concerning state, market and family, which in certain respects now are obsolete.

Welfare regimes in Europe

A common departure for research about welfare systems in a number of western countries has been to use Esping-Andersen’s typology of different welfare regimes.16 It is a “three worlds” – typology of regimes which are neither equal to welfare states nor to individual social policies. According to Esping-Andersen “regimes” refers to the way in which welfare production is allocated between state, market and households in a variety of European countries.17 They may be seen as ideal types. He identifies three regimes: the liberal, the conservative and the social-democratic regimes. This typology has been criticised on many points: for being too static,18 for using the wrong criteria,19 for omitting a fourth, Mediterranean regime type,20 for being too focused on income maintenance and paid work,21 for neglecting gender issues,22 and for neglecting aspects of social care,23 as well as the voluntary sector.24 The typology developed by Esping-Andersen is nevertheless considered to have both sensitising and clarifying power. It has had, and still has, a great impact on welfare state research. It is also a relevant frame of reference within which the welfare arrangements of the countries participating in the WREP-project can be understood.

15 Other countries, however, have been lagging behind in the welfare state development and have not followed the same time sequences. This is true, for instance for some of the Southern European countries.
18 Esping-Andersen 1996.
21 Sainsbury 1999; Szébelényi 1999.
The liberal welfare regime

Liberal welfare regime countries are typically the Anglo-Saxon countries: USA, Australia, New Zealand and Canada. Among the European countries it is the UK which fits with this regime type. Although displaying differences between them, these countries correspond to some common characteristics: the welfare regime is residual in the sense that it adopts a very narrow definition of risk, eligibility and of what is “social.” Liberal social policy favours means-tested social assistance. Targeted social assistance is a major element of the total social protection package in these regime-type countries. Insurance schemes are often quite modest, (although it is important to underline that the UK has a universal, national health insurance). A pertinent characteristic of this regime is its encouragement of market solutions in welfare – health, pensions etc. Nowhere in Europe was such encouragement more pronounced than during the Thatcher era in Britain. The liberal model then can be summarised in terms of the heavy weight of residualism, with few rights and modest levels of de-commodification.

The typology of the three welfare regimes was initially presented by Esping-Andersen in 1990, in his book The Three Worlds of Welfare Capitalism. In one of his more recent works he explores and discusses the comparative robustness of the regime typology. One problem, he argues, is the one time-point references the typology builds on and that it does not account for mutation. A very good example of this is Great Britain, one of the countries studied in this project. Had the comparison been made in the immediate post-war period, Esping-Andersen argues, Great Britain and Scandinavia would probably have been in the same cluster: both were built on universal, flat-rate benefits, national health care and a vocational commitment to full employment. Since then, a gradual privatisation and residualisation has taken place: in a contemporary comparison, Great Britain appears to be increasingly liberal and an example of regime-shifting.

The conservative welfare regime

The conservative welfare regime type is rooted in conservative political ideas and actions. In continental Europe, early social policy was often inspired by monarchical etatism, traditional corporatism and by Catholic social teachings in Catholic-dominated countries. The post-war welfare development has, in conservative welfare regime countries, most often been guided primarily by Christian democratic or conservative coalitions (in some countries with a Fascist interregnum). Countries corresponding to this regime-type are – and the extent to which the model fits varies

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27 The degree to which welfare states weaken the cash nexus by granting entitlements independent of market participation. Offe 1984; Esping-Andersen 1990.
28 Esping-Andersen 1990.
the various aspects of welfare – Germany and France which are two of the countries in the project presented in this book. Furthermore, Austria, Belgium and the Netherlands belong in this group. Italy, one of the countries in the project, is also placed in this regime-type by Esping-Andersen. Greece – another country in the project – is not specifically analysed within this regime type.

The essence of the conservative regime-type lies in its blend of status segmentation and familialism. Early social insurance schemes were far from building on egalitarian ideals and far-reaching status differentials have been preserved in many of the insurance programmes in most countries of this regime-type. The etatist legacy remains strong in the privileged treatment of public civil servants, especially in Germany, France, Italy and Austria. Despite attempts to consolidate the myriad of occupational schemes that exist in many of the countries here, corporate status divisions continue to characterise social security systems. Only the Netherlands constitutes an exception to this pattern, with regard to their pension scheme. In the conservative welfare regime type countries private market solutions generally play a marginal role. Non-state solutions to welfare issues instead often mean involvement by non-profit, voluntary organisations, often affiliated to the church, and/or “pillared” along denominal or language lines (such as the Netherlands and Belgium).

Familialism is an important attribute of this regime-type, and, according to both Esping-Andersen and Leibfried, this especially goes for the Southern European countries. Familialism is defined as a composite of the male-breadwinner bias of social protection and the centrality of the family as care-giver and ultimately responsible for its members’ welfare along the subsidiarity principle. There is a residual pattern in the conservative welfare regime but it does not have to do with market failure as in the liberal model. Conservative residualism is a response to family failure. The principle of subsidiarity has a strong general tradition in countries of this regime-type such as Germany, the Netherlands and the Southern European countries. Familialism is a much less pertinent attribute for France than other countries in this group. In fact, it is in certain ways problematic to place France in this regime-type over all.

Several scholars have argued that there are grounds for adding a forth regime-type to the original three world regimes (the social-democratic regime being the third one). The countries in question would be Italy, Spain Portugal and Greece which, some authors claim, have some regional similarities and specificities compared to other welfare regimes.

These are countries where the welfare state on the whole is weak. A characteristic trait in the existing systems is the heavy dominance of transfer payments with an extreme status segmentation in the income maintenance systems.

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30 In spite of the high degree of de-commodification of this country.
36 Ferrera 1997.
Family benefits and services are underdeveloped as well as services, including social care, on the whole. The role of family for welfare, not least in social aid, is stronger than in the Continental welfare regime on the whole.37 Chapters on Italy and Greece in this book will further develop these themes. Esping-Andersen refutes the argument that there are grounds for a fourth specific regime type.38 With their strong focus on status segmentation in social insurance and their high degree of familism, the Southern European welfare systems can be considered as a variant of the Continental welfare regime, he argues.

The social-democratic welfare regime

The social-democratic welfare regime was, according to Esping-Andersen, to a great extent constructed as a contrast to the other two regime-types and it is a latecomer on the international welfare scene.39 The principles of universalism, comprehensive risk coverage, generous benefit levels, egalitarianism and full employment are cornerstones to this regime-type. It is virtually synonymous with the Nordic countries. Sweden, Finland and Norway are the three Nordic countries which participate in the research project.

Universalism is coupled to citizens rights, i.e. social entitlements are attached to individuals and based on citizenship rather than on a demonstrated need or on an employment relationship. This means that citizens have a basic right to a broad range of services and benefits regardless of income and position in the labour market. High income replacement rates diminish the importance of the market in this regime-type and the degree of de-commodification in the model is from a comparative perspective, considered to be high. According to Esping-Andersen the social-democratic regime is also distinct for its active explicit effort to abolish dependency on private welfare.40

Another attribute of this regime-type is (or has been at least) the political commitment to full employment even times of recession.41 This is not unique to the Nordic countries. However, active employment policies have been pushed further here and with higher ambitions than elsewhere, along Nordic principles of “productivism.”42 Finally, the social-democratic welfare regime type is characterised by a high degree of “de-familialisation.” This concept is used by Esping-Andersen to denote policies that lessen individuals’ reliance on the family and that maximise individuals’ command of economic resources independent of familial or conjugal reciprocities.43 It has to do with, for instance, the range of state subsidies for the cost of care for children, old or disabled people.

38 Esping-Andersen 1999.
40 Esping-Andersen 1999.
41 Stephens 1996.
43 Esping-Andersen 1999.
Variations in “women-friendliness”

De-familialisation as a concept at first glance seems gender-neutral. Other authors speak about the degree of “women-friendliness” of a welfare regime or of a state. The Nordic countries have commonly been viewed as “woman-friendly states”: that help free women from economic dependence on their husbands and towards self-help support through work or through economic or social welfare transfers.44 In more recent works on his welfare-regime typology Esping-Andersen has looked into variations in de-familialisation between regime-types.45 He found that variations were as great as for de-commodification. The Nordic states remain the only ones where social policy is explicitly designed to maximise women’s economic independence, he concludes. Using overall service commitment, subsidies to families with children, public day-care coverage for small children and percentage of those aged 65 plus receiving home-help services, as four indicators of de-familialisation, he found that the social-democratic regime-type ranked highest on all dimensions. It was seconded by the Continental welfare regime type, excepting Southern Europe which ranked very low. Variations exist between countries within each regime types, however. Both France and Belgium scored high on public child-care coverage, for instance. Critics maintain that “women-friendliness” of a regime type is a more complex issue and that there is a risk of Scandinavian normativity in the way this phenomenon is usually measured.46

Systems of social care provision

A main line of critique concerning the welfare regime typology developed by Esping-Andersen argues that both in theoretical conceptualisation and in empirical analysis it is focused almost entirely on income maintenance, social insurance, labour market and paid work. It does not address the issue of social care, in fact not really provision of welfare services specifically. The same goes for the more tangible aspects of organisation of welfare services. The regime-type conceptualisation offers a context from which some inference about organisation, provision and welfare agents can be made. To a great extent, however, these aspects are invisible and comparative analysis of care and other welfare provision in different countries may even reveal contrary patterns to the alleged regime-type.47 There may even be reasons to divide between the social insurance state, which is “cash-heavy” and the social service state which is “service-heavy.”48

Social care arrangements are an integral part of society and of growing importance in countries with ageing populations and with needs for child day care,

44 Kjelstad 2001; Lewis 1997.
45 Esping-Andersen 1999; Anttonen & Sipilä 1996.
47 Anttonen & Sipilä 1996.
48 Kautto et. al 2001; Sipilä 1997.
in order to enable women’s participation in the labour market. A typology of the social care regimes would focus on, not only the care rationale, but on the agency, the recipient and on the carer.49 Agency has to do with the four sectors of society: state, market, family and the voluntary sector. The research tradition that focuses on different agents and sources of welfare provision uses concepts such as welfare mix or welfare pluralism. Szebehely argues for the need of being specific about distinguishing between paid and unpaid work in relationships to each agency.49 Social care research has also drawn attention to the need to explore the character of “the product” – what is care and what is it that recipients get? Which is the relationship between the carer and the recipient?50

The welfare mixes in provision of social care not only vary between countries. They have undergone changes in the past couple of decades within some countries, notably implying a more distinct division between the enabling agent and the provider role. Furthermore, decentralisation patterns vary. What may be the responsibility of regional government in one country may be the responsibility of local government in another, etc. These are some reasons for why comparative studies of social care are complicated, as pointed out by Rostgaard & Lehto.52 These authors studied formal social care for old people on a comparative basis. They found complex welfare mixes regarding state responsibility structures and regarding the agency of care in the different countries. Anttonen, Baldock & Sipilä came to the same kind of conclusion.53 In the Nordic countries the public sector was by far the most important provider of formal social care for old people, although increased privatisation of care provision can been seen, notably in Finland and in Sweden. Contracted care carried out by private providers, mainly for-profit, quadrupled during the 1990s in Sweden.54 Also in the U.K the public sector is the main provider of formal social care although as much as about 20 percent of care is provided by private, for profit contracted actors. In countries of the Continental welfare regime (such as Germany, France and the Netherlands) the main provider of formal care services is generally non-profit organisations i.e voluntary associations.55 A common pattern in European countries is a far-reaching de-institutionalisation of formal care for old people which has taken place in the past decades. This means that formal social care implies formal home-help and that old frail people stay on in their “natural surroundings.”

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50 Szebehely 1999.
Making informal helping and volunteering visible

The welfare mix conceptualisation also accounts for unpaid work in welfare and care. Characteristic of the welfare discourse in European countries in the past 15 years has been an increased interest from politicians and administrators in the unpaid care work carried out by citizens. The background to this seems ideological, on the one hand, and caused by economic problems of the welfare state, with budget deficits, on the other hand. Unpaid welfare work not only can fulfil a complementary role to paid care work, in many situations it is the only care available. Unpaid informal care provided by family for their frail parents, spouses, or relatives are most likely account for the major part of all social care for these groups, no matter what regime type.\(^56\) It is, however, an area in which there has been very little systematic cross national research. It is generally, and on grounds of their high degree of familialism, assumed that informal helping is particularly extensive in the Southern European countries. Furthermore, it has been argued that it is more characteristic of Continental and liberal regime countries than of the socio-democratic type countries.\(^57\) Recent research on informal helping in Sweden revealed however, that informal care was surprisingly extensive and of increasing importance in that country at a time of public cut backs.\(^58\) Support services for informal carers are a new ingredient in the welfare panorama. In some countries it has also become an area of research.\(^59\)

The new welfare situation of the 1990s has, furthermore, spurred research on the voluntary sector in many countries, notably concerning its role in welfare.\(^60\) Comparative studies of the extent and character of unpaid work in voluntary organisations – volunteering – have been conducted.\(^61\)

Curtis, Baer & Grabb used data from the World Values Survey of 1993 to make cross-national comparisons of volunteering, taking a point of departure in the Esping-Anderson three regime types.\(^62\) They found that countries of the social-democratic regime type take the lead, in volunteer work, followed by, or equalled by, countries of the liberal regime. Countries of the Continental regime type – with the very specific exception of the Netherlands – had lower scores. Countries in Southern Europe, with their high degree of familialism often seemed to rank very low in regards to volunteering in voluntary organisations. As for volunteering specifically in voluntary organisations for social care and welfare Gaskin & Davis Smith and Jeppsson Grassman & Svedberg found a somewhat different pattern, implying that volunteering in this type of organisation might be more developed in Anglo-Saxon countries as well as in some countries of the Continental regime type.

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\(^{58}\) Jeppsson Grassman 2003; Szebehely 2000.
\(^{59}\) Nolan, Davies & Grant 2001; Jegermalm 2003.
\(^{60}\) Harris, Rochester & Halfpenny 2001; Henriksen & Ibsen 2001; Jeppsson Grassman & Svedberg forthcoming.
\(^{61}\) Gaskin & Davis Smith 1995; Jeppsson Grassman & Svedberg forthcoming; Salamon, Anheier & Solokowski 1996.
\(^{62}\) Curtis, Baer & Grabb 2001.
than in the Nordic countries. Volunteer work in social care and welfare organisations seems to have increased in the past 10 years in some countries, notably in Sweden, perhaps in response to current welfare state situations. A logistic regression analysis of data from the most recent wave of surveys for the World Values Study (2000) concerning the countries of the research project, in regards to volunteer work in voluntary organisations providing welfare services specifically for elderly and/or disabled people, indicated a somewhat different pattern: controlling for age and gender, Britain was the country where this type of volunteering was the most common, followed by Sweden, Greece, Finland, Italy, France, Germany, in that ranking order.

Difference and convergence

The short overview presented in this chapter has pointed at differences between the European welfare-regime types, of relevance for the understanding of the countries presented in this book. At the same time some common patterns of problems and change have been explored. An ongoing debate is actually whether the welfare states of Europe are converging, in response to common problems and external pressures of economic, demographic or political nature. Are they in transition towards becoming more alike? Which welfare regime seems to/or should converge with which? The welfare regimes are assumed to differ with regard to their robustness to current pressures. Sometimes convergence seems to be defined simply as a process of movement towards a European average, or even towards a European minimum. If this were a correct interpretation, convergence from a Nordic perspective would mean a “Europeanisation” of Nordic welfare states while for instance countries in Southern Europe would be “catching-up” to that same European average. In the 1990s, cutbacks in welfare, restricted eligibility, and more market-oriented solutions made some Swedish scholars speak about “the flight from universalism” and a trend towards more liberal regime-like solutions. On the other hand, social policies of one country may function as inspiration for new solutions in another country. A very recent example is the German proposition for comprehensive child care, modelled on the Swedish child care system. Empirically, however, there seem to be few clear signs of real regime convergence, according to several authors in the field.

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63 Gaskin & Davis Smith 1995; Jeppsson Grassman & Svedberg, forthcoming.
64 Jeppsson Grassman & Svedberg, forthcoming.
65 This result is based on an analysis conducted by the author of data recently made available by the World Values Study (2004; cf. Inglehart et al. 2004). The analysis refers to odds quotas, with Britain as reference category.
66 Esping-Andersen 1996.
67 Sunesson et al. 1998.
68 Presented by the minister of family affairs, Renate Schmidt, in July 2004.
This debate, which is not new, also revolves around the issue of European integration, that is to say, the effect on the social policies of the member states. While globalisation and other external pressures are assumed to impact on welfare states mainly through unintended consequences, with regard to European integration it is more a question of intentional effects in order to achieve “harmonisation” between countries. There seems to be little consensus exactly how and to what extent this “harmonisation” will take place. Those authors who have specifically studied the issue of convergence in welfare systems seem to conclude that it is an open question whether convergence is really taking place, in a more profound sense, and if so, what kind of convergence and in what areas. It is not within the aim of this book to explore this issue of convergence. This introductory chapter has rather aimed at drawing attention to the differences and similarities of the welfare contexts within which the majority churches of each studied country exist and act.

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The Swedish welfare system

The Swedish welfare model is grounded in the understanding that the state and local authorities should guarantee the basic needs of all citizens. The main objective has been to create conditions for a just and equal distribution of public resources. This welfare policy includes the promotion of equality between women and men.

The Swedish welfare model is now under pressure. Complex economic and structural change along with an ongoing transformation of values, affect the capacity of the state to provide welfare. This in particular has affected groups of women. These changes have resulted in a growing political interest in creating opportunities for private companies as well as non-profit organisations to contribute to the development of the welfare society.

Welfare from the cradle to the grave

Sometimes Sweden is described internationally as the “The country that protects its citizens from the cradle to the grave,” often with a slightly sarcastic undertone. But this is an image with a lot of truth in it. What characterises the Swedish system is that the public sector has taken over significant responsibility for its citizens’ economic security in areas that have otherwise traditionally rested with the family. It begins at infancy, with public maternity care centres, and then continues with day care centres and preschools. In recent years, private and family-cooperative day care centres have been allowed into the market, but financing is still provided by public authorities, with day care fees on a sliding scale adjusted to the parents’ income, up to a certain maximum. Schooling is also free and tax-financed, at university and college level. The government offers generous study loans so that young people from all social classes can afford to study. The health insurance system guarantees all inhabitants virtually free health care and subsidised medicines and dental care. Care for the elderly too, is almost entirely financed by the public sector. For the elderly there is a public basic pension as well as an income based supplementary pension. Sweden also has publicly financed systems of housing allowances, unemployment benefits, sick pay, child allowances, parental insurance, and social assistance. The ambition of the social welfare safety net is that every Swede, regardless of ability or circumstances, should always be able to rely on the public sector to provide at least the most basic needs. This welfare policy and praxis has a specific historical background.
Family and church in the agricultural society

The contemporary Swedish welfare system has developed from a historical situation in the agricultural society where family and church were the central welfare agents. Until the midst of the 19th century church and society were interwoven in a way that it is hard to imagine today. Church and state, parish and municipality existed in complete unity. The local priest (who was always a man) was an unquestioned leader and his function as a state official included varied legal, educational, informative and controlling tasks. The church rituals framed the lives of people from birth to death. Citizenship was linked to baptism, and through confirmation one became part of the adult society and its values according to the classical pattern of rites de passage. The family had responsibility for the main part of what we today call welfare services; health care, social care and education. Social relationships were local and closely connected to family relationships. It was important to regulate relationships to relatives and other factors connected to inheritance, since a major part of social welfare was dependent on these factors. As the basic public authority the Church was responsible for a large part of society’s complementary caring services, mainly care for the poor, medical care and education.

The legal societal role of the Church began to change in 1862 when new laws separated local government responsibilities from church responsibilities for the first time in Swedish history. Hereafter church and society have separated area by area through the separation of a number of institutions from the responsibility of the church, for example schools and the care for the poor during the 19th century, and medical and social care during the 20th century. In the year 2000 the Church of Sweden ceased being a public authority.

Industrialisation weakened existing social security

When the industrial production system developed and grew in the second part of the 19th century, it became, in many ways, a threat to the uniform agricultural society. Production moved out of the home. People’s link to the earth was changed to a connection with technical equipment in the form of factory localities and machinery. The social and economic independence of women developed in a growing number of fields. The differentiation of the labour market provided new possibilities for women to work outside the home. The mechanisation of agricultural production provided the labour capacity needed in the new factories that were established close to the natural resources that could be extracted in new ways from areas of woods and mountains. From the middle of the 19th century and during the following decades new concentrations of populations grew around saw

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1 Bäckström 1983.
3 Enochsson 1949; Gellerstam 1971; Selander 1986.
4 Rosell 2003.
mills, iron mills and other industries. The reconstruction from agricultural society to industrial society meant extensive migration and a fast urbanisation of the previously agrarian character of Sweden. This quick change caused new social problems since the former welfare system based on relationships to relatives along with the church as a controlling agent, didn’t function in the new localities.

The industrial logic strove inherently towards a still higher degree of rationality and specialisation within all areas of society. Social life in the industrial society developed in line with this logic. Institutions became all the more concentrated around fewer functions and tasks at the same time as new specialised institutions and organisations established and grew. Even changes in families in the industrial period can be regarded as a consequence of rationalisation and specialisation. From a situation where all members of the family were active within the same type of occupation, the family was split up amongst different types of occupation. Different individual lifestyles were developed and people spent exceeding amounts of time in other social organisations than the family, e.g. workplace, school, preschool and old people’s homes. Several welfare contributions previously carried out within the family were gradually transferred to social institutions in the expanding public sector. This process is sometimes called “the loss of the family’s function.” Even the labour movement (founded 1889) and the union movement (founded 1898) can be seen as welfare functions that arose in relation to the social issues of the growing industrial society. Their strong role in Sweden has to do with their function in filling a social gap when ties to relatives broke up.

The Swedish model: Society as a caring family

Before World War I, the Swedish social system was largely modelled on the example of Germany. The 1930s became the starting point for the development of a new welfare model. The Swedish idea of society as a big family “the home of the people idea,” was born in the industrial society as an answer to the need for new social security nets that could replace the previous family and relative based welfare. The vision was to lift Sweden out of poverty once and for all, and to build a society where all citizens, regardless of gender, class and social origins, would be guaranteed basic economic security. This Swedish “home of the people” would not be based on charity, but instead financed by a tax system in which the well-to-do would bear the main economic burden. The underlying principle was “from each according to ability, to each according to needs.” This ambitious program not only included economic reforms, but also encompassed, for example, a construction program designed to guarantee all citizens high quality housing, with appropriate central heating, ventilation, access to daylight, kitchen and hygiene facilities, etc.

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5 Ogburn 1938/1982.
6 Palm 1982.
7 Papakostas 1995.

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One of several labels for this social welfare structure was “the third way” – a narrow, previously untrodden path between capitalism and socialism. This collective social structure was created by social engineering supported by a strong Swedish state and strong unions.9

The transition from family based welfare and poor relief to a modern welfare state can in many ways be regarded as an effect of the rational logic of an industrialism that was built on standardised collective solutions.10 Thus the need for standardisation within the industrial production system was accompanied with a social collectivism that shaped a uniform industrial culture developing out of the former homogenous agricultural society. The transition to a modern welfare state was a gradual process, but the years between the two world wars marked a substantial breakthrough. The fact that Sweden stood outside the First World War favoured the construction of welfare. A broad consensus in welfare politics was founded during the years between the two wars and became still more important when anxiety increased in the world. Several background factors contributed to the rapid change of society: industry’s increased access to capital, the 1930s general depression, the political alliance between the social democratic party and the party of the peasants, and the spirit of consensus. From the early 1930s, the Social Democrats ruled without interruption for more than 40 years, including two short periods of coalition government with the other non-communist parties during World War II. The strong union movement had great impact by contributing to stability and consensus.11 As a result of modernisation, Sweden successively reached the level of wealth in other European countries.

During the 1950s and 1960s, a period of unparalleled economic growth in Sweden, the world’s most extensive tax-financed social welfare system was built up. This included an extensive series of reforms, many of them later emulated elsewhere in the world. The decision to provide a folk pension was taken in 1946, child benefit was implemented in 1947 and a general medical insurance in 1953. The Home-help service which was previously provided by voluntary organisations, such as The Red Cross, was also nationalised. These decisions were followed by reforms within the core areas of welfare society; school, medical-, health- and social care. All these areas were successively taken over by the state, the county or the municipality. Thereby the welfare areas and responsibilities that had been handled by the Church of Sweden were transferred to other parts of society. Also the voluntary care provided by the Church’s diaconal institutions was successively transferred.12 As part of this development the Church of Sweden’s role as a folk church was integrated within the framework of the Swedish welfare model. The Church became a provider of public welfare within the spiritual sphere with clear and legally defined boundaries in relation to the social welfare responsibility of the state.

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Consensus and equality

The “Swedish model” was built on balance of power and a spirit of consensus between the interests of different societal groups. Until the abolition of the “four estates parliament” 1864, cooperation existed between the king, the Church, peasants and partially the nobility. This cooperation goes back to the reformation and the ideas of division of power between church and state. Church responsibility for the care of the poor is an example of that. It is this tradition of cooperation between state, church and welfare organisations that developed during the 20th century into the new “Swedish model” where the power balance was now held within one dominating structure – the social democratic regime. During the 20th century the labour movement has come to function both as the “king” (through the long period of social democratic government) and as the “people” (through the strong role of the dominating blue collar union, LO). With this background the concept “civil society” has, in Sweden, sometimes been perceived as an ideological term that competes with the social democratic idea of the strong state.

The Swedish “home of the people” period cultivated a family like informal life style on all levels of society, promoting the emergence of more equal conditions. This also meant that the continuing process towards a still higher degree of individual independence was supported when society took over the role of the family in a growing number of areas. Thus the collectivism of industrialisation in many ways created the preconditions for the growing focus of freedom and rights of the individual, values that flourish in today’s service society.

Transition from industrial to service society

The period of industrialisation implied a widespread migration from the countryside to newly established industrial localities. A new period of migration took place in the second part of the 20th century in the transition from the industrial society to a service society. Now people had to move from industrial localities to new expanding highly technological urban regions. Major economical and social problems arose, just as in the previous structural change of industry and work life. But this time the new welfare model and the social security systems that were created in connection with industrialisation reduced the negative effects. Thus the consequences were less damaging than in other countries where similar processes took place. Under the catchword of Swedish social democracy, “Work for all,” a number of supporting steps were taken to keep people in work or in educational programs. During the 1960s and 1970s the Swedish welfare state stabilised in a

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14 Lundström 2002.
15 Qvarsell 1993.
16 Dahlkvist 1995.
18 Ahrne et al. 1996.
period of fast economic growth and optimism for the future. The 1980s meant a continuous accelerating economy, in combination with new emerging ideas of decentralisation inspired by impulses from European subsidiarity ideas and market economic liberalism. A number of reforms were implemented which meant a decentralisation of public administration. State monopolies were criticised more frequently in the political and economic debate, even within the social democratic party. The centrally governed welfare state that had been built up during the previous approximately 70 years, was now beginning to be reformed and many state monopolies were deregulated and subjected to competition, e.g. telephone, post and railway. The deregulation of the Swedish state church in the year 2000 has taken place in parallel with these societal reforms and deregulations, and is a part of this major process of change.

The welfare balance sheet for the 1990s

In the early 1990s Sweden as well as Europe overall was hit by a severe economic recession with increasing unemployment and heavily raised public expenses. Different developments were observed in diverse parts of the welfare service sector. Generally an overall increase in decentralisation took place and an increase in user financing of public welfare services as well as a general market orientation. Private entrepreneurs appeared as providers of publicly financed welfare services, but privatisation remained a marginal phenomenon.

According to the Government’s Welfare Balance Sheet for the 1990s living conditions among the Swedish population underwent a number of major negative changes. An increasing proportion of the population encountered various kinds of disadvantage or ill fare. Along with unemployment working conditions altered in many ways, e.g. more short-term employment. An increasing number of people felt mentally stressed by changed conditions in their working conditions and psychosocially related mental problems increased. Mental well-being declined and the number of long term social recipients increased significantly. Relative wage positions declined in the public sector dominated by women. An increase in negative stress was noted among employees in the welfare service sector, where women are in a majority. In the same decade a lot of improvements occurred as well. Many people’s wages increased faster than in many previous decades. The general mortality rate continued to decline and infant mortality was nearly halved. The general education level rose, but class and gender differences evident at the beginning of the decade pertained at the end of the decade. The Government’s Welfare Balance Sheet for the 1990s identified four groups of citizens that were especially negatively affected by the development during the 1990s; single mothers, people born outside Sweden, young adults and families with children.

Swedish welfare policy stands at a crucial crossroads at the beginning of the 21st century. The massive Swedish economic security system is under heavy economic

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pressure, with such problems as waiting lists for elective health care, shortages of personnel, deficits in pension systems etc. From the political right, the need for a "paradigm shift" has been debated, but a majority of people have voted for politicians who will protect the system of publicly financed "basic security" even in an era of tougher economic realities.

Challenges to the Swedish model

The Swedish model is being confronted by several big challenges. A first, and maybe the greatest, challenge is the demographical development with a strongly aging population which causes anxiety in Sweden as well as in other parts of Europe. This will cause great strain on society’s welfare services and systems of financial support. The general tendency is that the older generation is expanding, while the number of young people is decreasing. Swedish public expenses are highly related to age, by the fact that a great part of the resources for the daily living of children and old people are distributed by the public sector. The part of the population that are over 65 years of age and have left the labour market through retirement will increase heavily in the immediate coming years. From 2002 to 2012 the number of persons under 20 is estimated to decrease by 30,000, while the generation over 65 will increase by 270,000. In the year 2030 23 percent of the Swedish population will be over 65, compared to 17 percent in 2002. The proportion of people aged 80 and over will rise during the same period from 500,000 to 750,000. Presently women make up 75 percent of those aged 80 and over. The surplus of women in the oldest ages is expected to last, but slowly be reduced, due mainly to an increase in male length of life expectancy. Government studies show the importance of increasing labour participation and productivity to counterbalance the shrinking cohorts of children and the increasing number of old people in years to come.

In connection to the changes in age structure tensions can be expected between different age groups, when the existing resources are limited at the same time as expectations for the same or increased standard of living persists. Ways other than high taxes are needed to manage the necessary transfers from the people in paid work to the older part of the population. This has led researchers as well as politicians to discuss possibilities to organise a distribution of existing resources over the life cycle of each generation, instead of between the different generations.

A second challenge to the Swedish model is globalisation. The transnational economy makes it more difficult to impose taxes on capital incomes. This automatically threatens welfare systems that are built on tax financing. The globalisation process and especially different international economic, political and

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22 Äldrepolitik för framtiden 2003, 11.
24 Söderström et al. 1999.
social networks also tends to harmonise different types of social systems, and thus threatens the “odd” Swedish “home of the people” model with high taxes and a strong socially caring state.

A third challenge is one aspect of the previous and a fruit of Sweden’s entrance into the EU with its convergence criteria, namely the demand for a balanced state budget. This demand is threatening the Swedish welfare system in its basic construction, since preserving welfare for all people is supposed to be second to state macro economy objectives.

A fourth challenge that is another aspect of globalisation comes from international migration in relation to Swedish comparatively liberal immigrant policy, an issue discussed particularly in connection with the expansion of EU on 1st May 2004. How is it possible to keep up free public welfare provision combined with open borders, when other countries maintain a much more restricted policy towards immigrants?

A fifth challenge consists of people’s increasing expectations of perceived quality of life and fulfilment of individual needs. Individualising in social services presupposes a variety of different alternatives to choose between. Such variation and flexibility is difficult to provide within the Swedish model that is built on uniformity and public monopolies.

The sixth challenge comes from the consequences of applying market models and competition to the organisation and management of welfare services and public management. With the ambition of making the public welfare provision more efficient and reducing its costs, management models from the commercial business sector have been implemented. In many ways this has worked out well, but questions have been raised as to how far it is possible to adopt commercial models in welfare services. In public debate it has also been questioned whether the implementation of the ideas of competition and commercial efficiency contributes to the perceived negative effects on work environment among personnel in welfare services. One can even ask if models from the “profit sector” are thereby threatening the core values of the supposedly “non profit” public welfare services.

A frequent subject taken up in the media is the consequences of applying economy measures to medical care, social care and schools. There is a general expectation that the Swedish public services shall be provided when they are needed, without primarily looking at the financial cost.

A seventh challenge to the Swedish welfare model is the changing labour market situation with an exceeding number of people outside the labour market and an increasing number of people having short term working contracts, with minimal social security linked to their work. In Sweden there has traditionally been a strong link between paid work and the social security system of the welfare state. Paid work has automatically meant access to many parts of the social security system, while people outside the labour market have also been left outside these parts of the Swedish welfare system. Basic social needs are distributed to everyone on a low minimum level, but much social security is linked to the individual income that comes from a position in the labour market. Work and security have been the two
basic foundations for the Swedish model, and they have been and still are, strongly linked to one another. This strong link has been especially negative for women who compared to their male counterparts have longer periods of unemployment during lifetime and are generally lower paid when they participate in the labour market. When, during the 1990s, Sweden was caught by mass unemployment the weaknesses in the model were demonstrated. Some researchers even question the whole idea of the Swedish general welfare model, if it really has ever existed as a general model.25 Such a model should ensure every citizen security during lifetime. But with the strong link between paid work and many of the social security systems, the Swedish model cannot live up to this unless the labour market functions properly.

An eighth challenge comes from the growing economic and social gaps that emerge in society through new types of social exclusion. Social gaps are caused by several interacting factors, mainly the reduction of the proportion of people that are active within the labour market, the general striving for reduction of public welfare costs and as part of that the economy measures within public welfare, e.g. in psychiatric care. New forms of poverty and new groups of socially excluded people emerge as a consequence of the reduction of essential parts of the “home of the people,” in a situation when the family’s traditional caring role is regarded as belonging to past agricultural history.

These challenges form the background to the reflection and rethinking of the Swedish model that has been on the agenda in Swedish politics since the 1990s. The different challenges raise several questions concerning welfare and welfare provision.26 The most high profile political issue during the last years has been the very high numbers of people off work for health reasons. Costs for temporary disability pensions have increased strongly. It is debated whether this is primarily a consequence of stress in work life, or if it is at first hand a consequence of a too generous application of public health insurances. Questions concerning the relationship between general well-being and quality of life immediately come up when these types of welfare issues are being discussed. Thus the welfare debate often touches upon the core values of individuals, institutions and organisations.

The Swedish welfare model in change

General economic development implies that production of services is getting relatively more expensive, while the production of goods becomes cheaper and cheaper. During the 1980s a political discussion was initiated in Sweden on decentralisation as well as privatisation of public welfare services.27 This discussion was actualised during the economic crisis of the 1990s. Private companies as well as voluntary organisations were suggested as possible welfare entrepreneurs. The complementary role of family, relatives and voluntary organisations as resources in
medical care, social care and school was also brought up in a new way. A consensus has gradually been built up amongst all the political parties to include other complementary agents alongside state and municipality within the welfare area. The major changes have probably taken place concerning the responsibility family and relatives are expected to take for their close kin. Within the health service and social care a number of commercial companies have been established, that run their own hospitals, social care institutions and staff distribution agencies within the field of medical and social care. In many localities organisations and cooperatives have established nurseries and schools with financial support from public authorities. The Church of Sweden is one of these new agents in the field of welfare. In many places the local church (parish) cooperates with the municipality in running pre-schools. Presently there is also a broad range of new initiatives and pilot projects in cooperation between church and municipality within the field of social care. But still the new entrepreneurial and market based view of welfare provision is recent and not at all evident. Many regard it as a threat to a Swedish model that they think is worth defending.

Organisation of the public sector

Sweden has three democratically elected levels of government: the Parliament (Riksdagen) at national level, the county council (landstinget) at regional level and the municipality (kommunen) at local level. Each one of them has different areas of responsibility and different duties. Municipalities and county councils are run by elected bodies known as municipal and county council assemblies. They are composed of politicians who are directly elected by citizens every fourth year. County councils and municipalities have their own power to levy taxes and their own decision-making bodies. At regional level the state is represented by the County Administrative Board (länsstyrelsen), which can be said to extend the reach of the state in the county. The Government (Regeringen) appoints the members of the County Administrative Board as well as the County Administrative Board’s highest officer, the county governor (landshövdingen). Sweden’s Parliament is the legislative assembly and it is chosen every fourth year by the Swedish people. The Parliament chooses the Prime Minister (statsministern) and the Prime Minister appoints the Government. Sweden has been a member of the European Union since 1995, and as such Sweden cooperates with 14 other (and now more) countries on economics, foreign policy and police and judicial issues.

The municipality

There are 290 municipalities in Sweden. They have significant powers of self-determination and are responsible for local issues in the immediate environment of citizens, such as pre-school, primary and secondary schools, care of the elderly,

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28 Social ekonomi 1999.
29 SverigeDirekt 2003.
roads, water and sewerage and energy issues. The municipalities also grant various
types of permits such as building permission and licenses to serve alcohol, and are
active in issues that affect business development, tourism and culture within their
geographical area. The highest decision-making body in the municipality is the
Town Council (Kommunfullmäktige). It consists of publicly elected politicians and
works like a local parliament.30

The County Council
The county council has the duty of handling major tasks that would be too costly
for a single municipality to deal with. Their main task is the responsibility for health-
care in the county. The county councils manage the public dental care, the National
Dental Service, and they are also responsible for the planning of Swedish dental
care, in both the private and public sectors. Besides these duties the county
councils, together with the municipalities, have responsibility for county public
transport. The county councils also work on regional growth and development and
as part of that support commerce, tourism and culture in the region. The highest
decision-making body in the region is the County Council Parliament (Landstings-
fullmäktige) where publicly elected politicians are members. The county councils’
duties are regulated by the Local Government Act and other enactments.31

National government authorities
In Sweden there are around 300 central committees, boards, authorities and state
companies that are organised under the national government’s different ministries.
Their duties are to implement the decisions that parliament and national government
make. The government authorities are independent and act on their own responsibil-
ity. Examples of such authorities are the National Board of Health and Welfare
(Socialstyrelsen), the National Social Insurance Board (Riksförsäkringsverket) and
the National Labour Market Board (Arbetsmarknadsstyrelsen). Examples of state
companies are the Post Office and the Swedish Broadcasting Corporation.32

The Church of Sweden and the welfare system

**Official theological self-understanding**

The overarching identity of the Church of Sweden is regulated in the Church of
Sweden Act, which was passed in the Swedish parliament and went into force 1st of
January 2000. The Act declares that the Church of Sweden is an evangelical
Lutheran Church. The church is described as an open folk church which operates in
the whole country and which has a democratic organisation working together with

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30 SverigeDirekt 2003.
31 SverigeDirekt 2003.
the ordained ministry. The Act also declares that the Church of Sweden is episcopally organised, and that it’s General Synod is its supreme governing body.

The more precise regulation of the theological identity of the Church of Sweden is however left to the Church and its General Synod and has been expressed in the Constitution of the Church of Sweden. The Constitution declares that “the faith, confession and doctrine of the Church of Sweden is expressed in her worship and in her life: it is founded upon God’s holy word, as given in the prophetic and apostolic writings of the Old and New Testament ...” The Constitution then refers to the traditional Lutheran confessional documents, as for example the Augsburg Confession, to the liturgical books and to the ecumenical confessions like the Nicene Creed in order to define the confessional identity of the church.

In commentary to the Constitution Gunnar Edqvist et al. (2003) concludes that the purpose of referring to the historical confessional documents is not to separate the Church of Sweden from the beliefs of other churches, but to affirm that the Church of Sweden accepts apostolic teaching and tradition. The regulation of the Constitution has, according to Edqvist et al., three functions. It is a part of the identity of the Church, it defines the programme of the Church and it serves as a legal ground for disciplinary measures regarding the ordained ministry.

The Church of Sweden is, as most majority churches in Europe, a theologically pluralistic church. The definitions in law and in church regulations are of such a general character that they in practice say very little about what is actually believed by the members or taught by the ministry. In official presentations, the Church underlines that it is an open church, which contains different theological and spiritual traditions.

Perhaps the most significant concept in the Church of Sweden’s self-understanding is the notion of the church as a folk church (Swedish: folkkyrka). This notion has very special connotations in Swedish ecclesiological debate, beginning in the first years of the 20th century. The concept was used by theologians and bishops such as Einar Billing and J. A. Eklund partly in order to show that the free churches’ critique of the church of Sweden was theologically unjustified. For Eklund and Billing, the church should not be seen as a voluntary association of its members. Rather, the Church ought to be understood as God’s instrument for dealing with humankind. The Church was an instrument of grace, prior to being an association or even a congregation. This meant for the early folk church theologians that it was wrong to demand loyalty to the church’s confession from all its formal members.

Membership of the church expressed a will to belong to the church, and a readiness to listen to the gospel. But it should not be demanded that lay members also actively should confess the faith of the Church. Such a demand would make people hesitant and could be a hindrance to the Church’s prior task, which in Billing’s phrase was to preach “the forgiveness of sins to the people of Sweden.” Together with this semi-sacramental view of the church, folk church ecclesiology

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was also often combined with national romanticism, expressed in a typical phrase of the beginning of the last century: “the people of Sweden – a people of God.”

Today, folk church ecclesiology is seldom expressed with phrases borrowed from national romanticism. But it is still a fact that the term ‘folkkyrka’ is a very important term for understanding much of the identity of the Church of Sweden. The ideal of being an open, inclusive and nation-wide church is still frequently expressed with that term, and it has even found its way into the Church of Sweden Act. Even if the Church of Sweden in some very important aspects has been disestablished, it is still very much a church which wants to be related to the whole of Swedish society.34

Statistics regarding the Church of Sweden

At the end of 2002, the Church of Sweden had 7,220,694 members, which meant that 80.9 percent of the population in Sweden were members of the Church of Sweden. The same year 67,161 people (70.1 percent of all newborn children) were baptised, and 82,441 people were buried in a funeral service within the Church. That means that 86.8 percent of all deceased were buried in a funeral service in the Church of Sweden. 57.9 percent of all wedding ceremonies took place in the Church of Sweden. It is relevant to note that there is no obligatory civil marriage in Sweden, so wedding ceremonies in the Church of Sweden and many other denominations have legal status.35

Membership of the Church of Sweden 1995–2002
(Source: www.svenskakyrkan.se/statistik)

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of members</th>
<th>Percent of the population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>7,601,194</td>
<td>86.0</td>
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<td>1996</td>
<td>7,546,757</td>
<td>85.3</td>
</tr>
<tr>
<td>1997</td>
<td>7,505,930</td>
<td>84.8</td>
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<td>7,399,915</td>
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<td>2000</td>
<td>7,360,825</td>
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<tr>
<td>2001</td>
<td>7,285,101</td>
<td>81.9</td>
</tr>
<tr>
<td>2002</td>
<td>7,220,694</td>
<td>80.9</td>
</tr>
</tbody>
</table>

34 Ekstrand 2002.
35 Church of Sweden Statistics.
Main other religious communities

Following Margareta Skog and Jonas Alwall it is reasonable to divide the religious communities in Sweden beside the Church of Sweden into the following categories:

- Traditional Free Churches
- Independent Christian groups
- Protestant immigrant churches
- The Roman Catholic church
- Orthodox and Eastern Churches
- Jewish parishes
- Muslim organisations
- Hindu and Sikh groups
- Buddhist groups
- Bahá’í

Presenting statistical information about these types of religious communities is problematic in a certain respect. Different communities have different ways of understanding membership, and some do not present official membership rates. One way of solving this problem is to use the figures used by the Board for state grants to religious communities. This board presents statistics of how many people different communities serve by their activities. In the following, we will use figures presented on the SST website for the year 2001.

The Roman Catholic Church served 144,843 persons, and is in that respect the largest religious community except the Church of Sweden. It is followed by the Mission Church which served 142,477 persons and the Pentecostal movement with 136,080 served people. Muslim organisations served about 100,000 people, and Orthodox and Eastern Christian Churches about 101,000 people. Jewish parishes served 10,923 people. The SST website does not present any figures for Buddhist or Hindu religious communities. Alwall 2001 estimates the number of Buddhists in Sweden to about 10,000–15,000 people and the number of Hindus to about 3,000 to 4,000 people.

From this statistical overview it is possible to say that, numerically, the main religious groups beside the Church of Sweden are traditional Free Church communities such as the Pentecostal movement and the Evangelical Covenant Church. These are followed by the Roman Catholic Church, the Muslim communities and the Orthodox and Eastern Christian Churches.

Within the group of traditional Free Churches, the Pentecostal Movement and the Evangelical Covenant Church are the major Free Churches in Sweden. Other numerically significant Free Churches are for example the Salvation Army with

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37 Samarbetsnämnden för statsbidrag till trossamfund, SST.
38 www.sst.a.se/statistik.htm.
about 24,000 served people, and the Baptist Union of Sweden with about 34,600 served people.39

The Roman Catholic Church has grown significantly during the second half of the 20th century, mainly due to immigration. There have also been quite a lot of conversions from the Church of Sweden and other denominations. There are 38 Roman Catholic parishes with about 140 priests in the whole country.40 The Orthodox and Eastern Christian Churches are divided into mainly nationally defined communities. The Syrian Orthodox Church, the Serbian Church and the Greek Orthodox are the numerically most important of these.41

There are three major Muslim organisations in Sweden, with approximately 90,000 members.42 These organisations cooperate in a common committee in order to handle distribution of state subsidies to Muslim religious activity. They also cooperate in certain policy issues, for example in contact with parliamentary committees and government bodies.43

One of the central problems for the Muslim communities in Sweden is access to mosques. The building of mosques is frequently discussed in the media, and sometimes causes protest in local communities. Since not all Muslim groups are able to use the same mosque, the fact that a mosque has been built does not automatically mean that all Muslims can or want to use it.44

Another difficulty for Islam in Sweden is the way religious life traditionally has been organised in Sweden. State support to religious activities is distributed via central religious organisations, something which traditional Christian churches often have. Islam, however, has not traditionally been organised in that manner, and therefore it has become necessary to develop structures that can cooperate with state authorities in certain respects. Discussions and conflicts within the Muslim community have led to the creation of different national organisations. According to ethnologist Ingvar Svanberg, the Swedish way of organising religious life is often described by Muslims as problematic from a Muslim point of view.45

Organisation and finance of the Church of Sweden

In a certain respect, it can be said that the Church of Sweden was disestablished by the Church of Sweden Act 1st of January 2000. The Government no longer appoints bishops or other senior church officials, and the Parliament does not enact Church legislation. But the Church still is regulated by law, and has certain legally defined rights and obligations. The Church is, for example, still responsible for organising the funeral system, even for citizens who did not belong to the Church of Sweden.

39 www.sst.a.se.
41 www.sst.a.se.
43 www.muslim-mediawatch.com/is-i-sv/4samverkande.html. See also Olivestam et al. 2002.
The Church authorities are thus by law required to offer places for burial acceptable for other religious communities such as, for example, the Muslims.

The Church of Sweden is organised on three different levels: the national level, the regional, diocesan level and the local, parish level. The local level consists of more than 2,000 parishes. The parish level is seen as the base of the church, and most church activities are organised on that level. According to the Church Constitution, the parishes have four main tasks: they are responsible for worship, teaching, social/diaconal work and mission. The parishes are normally territorially defined; members of the Church of Sweden living within a certain area constitute a parish. There are also a few non-territorial parishes. There is no possibility for members to choose which parish they want to belong to. You belong to the parish within which territory you live. In order to belong to the few non-territorial parishes, you have to meet certain criteria, which are very narrowly defined. There is a debate on this so called principle of territoriality, but the General Synod has been reluctant to change the present system in any radical way.

A parish is governed by the parochial church council and the vicar. The church council is democratically elected in elections in which all members of the parish have the right to vote. A characteristic of these elections is that the same political parties that take part in other elections in Sweden nominate most candidates. This is, however, not required by legislation, but a consequence of the representative election system in the Church and builds on a tradition going back to the beginning of the 20th century. There are also “non-political” groups in church elections, and there is a growing unease both within the political parties and the church about the political parties having such a central role in the governance of the church. The social democratic party, however, has declared that it does not wish to change its participation in church elections.

The parish council consists of elected members and of the vicar. The vicar cannot be elected chairman of the council. The council is the governing body of the parish, and controls finance. It is not, however, allowed to interfere in the pastoral activity of the ordained ministry. What this means exactly is, however, not totally clear. It is obvious that the council cannot prescribe what the ministers are allowed to say in sermons, or which hymns that ought to be sung in the services. It has also been decided by the supreme court of the Church that the vicar ex officio is the supervisor of all employed staff in the parish. There is however a small tendency towards increasing numbers of conflicts between parish vicars and parochial church councils. This can be related to the fact that following the disestablishment of the church the vicar is no longer employed by the diocese but by the local parish.

The parishes of the Church of Sweden are organised into 13 dioceses, which are led by a diocesan bishop. Presently, two of the diocesan bishops are women. In the archdiocese of Uppsala there is, alongside the Archbishop, also a suffragan bishop, since the Archbishop has a lot of responsibilities at national level. The task of the diocese is to organise and inspire church activity within its territory and to exercise the function of episcopé (oversight) over the local parishes. The bishop is the only official authorised to ordain priests and deacons. He or she cannot ordain persons
other than those approved by the diocesan chapter, but has always the right to a veto. The diocese is governed by a diocesan synod and a diocesan board elected in the same way as parish councils in democratic, representative elections. The bishop always functions as chairman of the diocesan board and the diocesan chapter. There is no special representation for the diocesan clergy in the synod or on the diocesan board, except in the person of the bishop. In the diocesan chapter, which functions as a diocesan court and as an approval body for ordination to the ministry, the clergy (priests and deacons) have the right to representation that along with the bishop’s vote gives the ministry 50 percent of the votes in the chapter.

The bishop is elected by an electoral college consisting of all priests employed by the parishes within the diocese, and an equal number of lay people. The bishop’s mandate lasts until he or she retires or is removed from office by a church court.

The national level of the Church is responsible for church legislation, for ecumenical contacts with other churches, and for church education. International mission or Church organised humanitarian assistance is also mainly organised at a national level. There is also an ecclesiastical supreme court. The national level is governed by the general synod, which consists of 251 elected members. There is no given representation for the clergy. The bishops are obliged to be present and have the right to take part in the debates and present proposals to the synod. They cannot vote in the synod if they are not elected, however. The bishops also make up the majority in the doctrinal committee of the synod. The committee has a suspensive veto in doctrinal matters, which can only be overruled by a 2/3 majority in the synod.

The Archbishop is the “primus inter pares” of the college of bishops and has important representative functions for the Church at national and international levels. He or she is also chair of the national church council, which functions as a kind of church government under the General Synod.

The Church of Sweden has a relatively good financial situation, mainly due to the fact that all members have to pay a church fee (or church tax). This fee is collected by the state tax authorities and has the legal status of a tax. The church also has a lot of landed property and funds at all organisational levels. The number of employed staff is about 25,000 people. Among them about 3,400 are ordained priests, and 1,200 ordained deacons.\(^6\)

The total fortune of the Church of Sweden is about 30 milliard crowns (about 300 million euro). This includes landed property, church buildings etc. The value of the landed property is about eight milliard crowns and consists of 1.2 million acres of land which gives the church a yearly income about 450 million crowns. The main income (about 80 percent) of the Church of Sweden is however the church fees, which is about 10 milliard crowns per year. The total amount of costs for the Church of Sweden is about 12 milliard crowns every year.\(^7\)

There is no exact record of voluntary workers in the church of Sweden. About 60,000 people function as elected members of different church councils and synods, and about 100,000 persons are involved in church choirs. Among them about 75

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\(^6\) Matrikel för Svenska kyrkan 2003.

\(^7\) www.svensakyrkan.se.
percent are women. Different church clubs and voluntary organisations, such as the Church of Sweden mission, are heavily dependent on voluntary work. The high number of employed staff however points to the fact that many church activities are organised by employees.

The Church and the welfare system

The Church of Sweden is one of the largest producers of social welfare apart from the state and official local authorities. This means that the Church of Sweden is one of the main agents within the voluntary sector (or civil society) in Sweden.

Church activities within the welfare area have a long tradition in Sweden. Until the middle of the 19th century, the Church of Sweden was more or less the only body in society taking a formal responsibility for social welfare. In a process of societal differentiation and the growth of the modern welfare state, the Church lost most of its traditional responsibility for welfare. The first major step in this direction was taken in 1862, when the local authorities were separated to form civil part and an ecclesiastical part.

At the same time as church and state have been successively separated during the 20th century, the state has repeatedly stressed that the Church of Sweden is an important factor for the welfare of the citizens. The state has always recognised the importance of the Church for the “spiritual welfare” of its citizens. At the end of the 20th century different committees working with the disestablishment also started to express the opinion that the church had an important role to play for welfare at large.

It is possible to describe the role of the Church of Sweden according to what Anders Bäckström has described a principle of complementarity. The Swedish welfare model takes it for granted that the state has the overarching responsibility for the welfare of its citizens. But the family, NGO:s or churches can complement the welfare services offered by the state when state services are not sufficient. This principle of complementarity is also in line with the ideology of the social democrats, and has strong support in Swedish political life.

The principle of complementarity means that the Church normally does not offer much of basic welfare services. It is very rare that the Church offers medical care or provides people with long-term economic support. Rather, the welfare services provided by the Church of Sweden can be categorised into two types: direct activities and symbolic activities. The direct activities are mainly of a complementary character, as for example bereavement counselling, running a shelter for homeless people with financial support from local authorities (e.g. in Gävle) or organising day-time activities for elderly people.

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48 See for example Wijkström & Lundström 2002, 94.
50 Ekstrand 2002.
51 Bäckström 2001, 152.
52 Wijkström & Lundström 2002, 205 ff.
The symbolic function of the Church is about giving the individual an opportunity to relate to a collective identity and also to something transcendent, which offers both ultimate security and a legitimisation of values of care and safety. This is not the least obvious in times of catastrophe and crisis. The church also functions as a critical voice which defends values of human dignity and of solidarity. The relation between the welfare activities of the church and the symbolic function is important, according to Bäckström.\textsuperscript{54} By its activities the Church shows that it takes it own values sincerely.

The main principle for the Church of Sweden’s relation to the welfare system is, as was said above, the principle of complementarity. This principle is not radically questioned within the Church, and there are not any obvious indicators showing that either the Church or the state authorities would like to change this situation. But what may be subject to change is the relative importance given to the Church’s symbolic welfare function and its direct welfare activities. In their study \textit{Från röst till service} (From voice to service) Tommy Lundström and Filip Wijkström pointed to the long-term consequences of the state’s growing interest in cooperation with the third sector in Swedish society.\textsuperscript{55}

Lundström and Wijkström point to the fact that the state has become more positive to the idea of “outsourcing” welfare production to voluntary organisations in the third sector. These organisations then risk becoming dependent on the income they get from this production, which may make them more reluctant to be critical towards the state authorities and the overall construction of welfare society. This trend has not yet affected the Church of Sweden in any radical way, but it should be noted that the Church has become more active in direct welfare production after disestablishment from the state. Whether this will lead the church to become more of a service producer than a critical voice in Swedish society has yet to be seen.

The folk church character of the Church of Sweden has sometimes made it difficult for the church to act politically within Swedish society. Historically the Church has often cooperated with the political elites, and in some respects this may still be said to be the case.\textsuperscript{56} But the Church often also takes an active part in the political debate. This is often criticised in the public debate; it is claimed that the Church ought to concentrate on spiritual activities and not take part in daily politics. One of the more spectacular debates was caused by the Bishops’ conference in 1993 with the pastoral letter \textit{Rich and Poor}.\textsuperscript{57} The bishops’ letter discussed global economy and it’s consequences for the poor and argued for a more just distribution of economic goods between rich and poor countries. When the bishops or other church authorities think that it is necessary, declarations or pastoral letters like \textit{Rich and Poor} can be issued.

One more prosaic way for the Church of Sweden to make it’s voice heard in politics and in regard to welfare issues has to do with the political culture in

\textsuperscript{54} Bäckström 2001.
\textsuperscript{55} Lundström & Wijkström 1995.
\textsuperscript{56} Thidevall 2003.
\textsuperscript{57} Biskopsmötet 1993.
Sweden, focusing on agreement and cooperation. This is expressed in the tradition of the Government and other decision-making authorities to sending out their proposals for comment to a number of organisations before the proposals are brought to Parliament. The national Church council, the Archbishop or the Bishops’ Conference send their comments on a number of Government proposals every year. One of the latest was the national Church council’s comments on the Government document on transplantations, where the Church of Sweden expressed it’s support for the Government’s ambition to make more people willing to donate their organs for transplantation.58

Welfare and liturgy

The relationship between the liturgy of the Church of Sweden and its role within the welfare sector is complex. The symbolic function of the Church in regard to welfare issues is often expressed in liturgical forms. The Church offers a lot of ways of expressing and interpreting important stages of life liturgically. The rites of baptism, marriage and funerals are of course central in this regard. But another form of symbolic action within this area is liturgical actions performed in times of crisis and catastrophe. When there is a major crisis in Swedish society, it is quite common that the churches are held open, special divine services are held and priests and other representatives of the Church of Sweden are interviewed in the media.

The liturgical actions of the Church have, in a certain respect, an important function for welfare in Sweden. By offering an opportunity to interpret important and/or difficult situations in life, the Church contributes to a sense of meaning and community.59 It is normally taken for granted, both by people at large and by church representatives, that the Church ought to do this. The Church’s willingness to accept this role and to provide liturgical actions when needed, can be said to express its identity as a folk church, both sociologically and theologically.

Situation and policies regarding gender

There is a general political consensus in Sweden on the principle of gender equality. The official policy on gender equality is closely related to the welfare system as such, which is based on a dual bread-winner model. This means that the official politics in Sweden are based on the idea that women work and support themselves and their families in the same way as men. Together with other Nordic countries Sweden has a record-high female activity rate. About 80 percent of the female population between 20 and 64 years is part of the work force.60 Swedish family policy is based on the principles of universality and individual rights. This means that no

60 Swedish Statistics 2002.
entitlements are targeted at women in their capacity as wives. Both men and women are supposed to be able to combine work and parenthood, and to a growing extent also care for the older generation.

The overall aim of Sweden’s gender equality policy is for women and men to have the same opportunities, rights and responsibilities in all significant areas of life. This implies such things as:

- Equal division of power and influence between women and men.
- The same opportunities for women and men to achieve economic independence.
- Equal terms and conditions for women and men with respect to owning their own business, work, employment conditions and career development opportunities.
- Equal access for girls and boys, women and men to education and the development of personal ambitions, interests and talents.
- Shared responsibility for work in the home and with children.
- Freedom from sexual (gender-related) violence.\(^6\)

There is also a political consensus over the idea that the authorities shall actively promote gender equality, both by concrete political measures and by policies aimed at changing attitudes. Politically gender equality is promoted by “mainstreaming.”\(^6\) This means that a gender equality perspective is expected to be a natural part of government policy. Every minister in the Government is to this end responsible for analysing, following up and presenting proposals concerning equality between women and men in his or her respective sphere of politics. A minister holds a specific responsibility for the processing of gender equality matters. Presently (2004) it is located to the Division for Gender Equality in the Ministry for Industry, Employment and Communications.\(^6\)

**The Equal Opportunities Act**

The principle of gender equality in Swedish politics dates back to the 1970s, when also a specific term, “jämställdhet” began to be used to denote equality between women and men in society.\(^6\) The liberal author Eva Moberg coined the term in her essay “The conditional liberation of woman.”\(^6\) Moberg criticised the fact that women were free to work only on condition that they kept their responsibility as house-wives. Moberg argued strongly that the responsibility for care had to be widened to include men. The political reforms during the 1970s also went in this

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\(^{62}\) Gender mainstreaming is a globally recognised strategy for promoting gender equality. Mainstreaming involves ensuring that gender perspectives and attention to the goal of gender equality are central to all activities of an agent.

\(^{63}\) http://naring.regeringen.se/inenglish/areas_of/equality.htm.

\(^{64}\) Equal is the word which translates as the Swedish word “jämlik/jämlikhet”. Sometimes the term “equal status” has been used to translate the specific term “jämställdhet”. However the term “equal opportunities” is also used, for example, in the wording “equal opportunities ombudsman”. In this text we have chosen to use the expression gender equality to denote the Swedish word “jämställdhet”; following official translations from the Swedish government.

direction. In 1971 a law on individual taxation was adopted. Previously a married couple paid tax on the sum of the income of both, a system that gave benefits to families where the woman stayed at home. Another important change came in 1974, with a law that made it possible for parents to share parental leave. This gave fathers the same right as mothers. It was however not until 1995 that one month of the parental leave was reserved for each parent. In 1989 another gender specific benefit, the special pension for widows, was abolished, although with certain exceptions for women born before 1954.

In 1980 a new government authority, the Equal Opportunities Ombudsman (www.jamombud.se) was established as a result of the adoption of the Equal Opportunities Act.66 Basically the act prohibits sex discrimination in the labour market. It also requires that all employers, whether in the public or private sector, shall actively promote equal opportunities for women and men in the working environment. All employers with a minimum of ten employees are required to prepare annual equal opportunities plans, as well as plans of action for equal pay. The primary task of the Equal Opportunities Ombudsman is to ensure compliance with the Act through advice and information. The Ombudsman also provides assistance in disputes regarding violations of the Act’s ban on gender discrimination. Since 1 January 1995 an expert on equality issues is also to be found on regional level at each County Administrative Board. The expert supports the leadership of the County Administrative Board with respect to the implementation of the national policy for equality.

Changing gender contracts

The historian Yvonne Hirdman wrote the history of the Swedish welfare system for the governmental Study of Power and Democracy in Sweden in the late 1980s.67 She traces the egalitarian profile of this policy back to the French revolution, the Enlightenment and the first period of industrialisation in Sweden.68 The stirrings of old social patterns during this period deeply affected the relations between women and men. The result was a rising gender conflict characterised by a tension between integration and segregation. The integrating force she identifies as deeply embedded in the new industrial capitalist economy and the evolving democratic ideals. The segregating force came from what she calls the “gender system,” the structure whereby men and women traditionally had been kept apart in a hierarchical order. Hirdman shows in her in-depth analyses of gender relations in 20th century Sweden how the integrating forces of modern society time and time again have called for a

67 Hirdman 1987; 1990.
restructuring of this hierarchical segregation, a restructuring which she theoretically identifies as the establishing of a new “gender contract.”

She identifies three periods characterised by different contracts. The first period which continues up to the 1960s she calls the “the housewife contract.” Women had made their first entry into public life with the right to vote 1921 and the right to uphold public office (except for priesthood) in 1925. In spite of these achievements in political life the ideals for women were still mainly connected to the home, and most women saw the home as their major working place, whether they also had paid work or not. The main role of women in society was the role of the housewife. Also at an ideological level the man as the breadwinner, and the woman as the caretaker of home and children was the model. This model of private life was also mirrored in society, in the image of Sweden as “folkhem,” the home of the Swedish people.

As Sweden was not directly involved in the Second World War, the Swedish economy was in much better shape after the war than in the rest of Europe. The long Social Democratic rule had been characterised by the encouragement of a mutual responsibility for the “folkhem” on the part of the Labour Movement and the employers. The 1950s meant an increase in the demand for women in the labour-market. The political motto was equality, effected through a rise in the living standard for all. The integration of women in the labour-market was inscribed in this discourse of equality. Hirdman characterises the period from 1960–1975 as the “equality-contract” with regard to gender. The equality still however presupposed women to be responsible for taking care of home and children. A new ideal of a family with two earners however began to emerge. The ideological framework for this was that the public authorities could, to a certain extent, take over the responsibility from the women.

The period of steady increase in the demand for women in the labour market coincided with the evolvement of the second wave women’s movement all over the western countries. The 1960s and 70s in Sweden saw the rise of a radical feminist movement, closely connected to the new left. For the first time in public the ruling gender contract was questioned at its roots. The legalisation of the contraceptive pill (1964) and the right to free abortion (1975) were reforms which together with above mentioned changes in taxation and child care laid the foundation for the “gender contract.”

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69 By “gender contract” she aims at focusing the concrete and active process whereby the gender system is continually renegotiated into new patterns, although the basic system of hierarchy and separation is not touched upon. Hirdman 1996, 121. See also Hirdman 1998.

70 Klas Åmark and others have stressed that the image of the Swedish woman as a housewife has to a large degree been a myth, made up from what was economically possible for a wealthy group during a short period. The male breadwinner model has never been completely dominant in Sweden. In the agricultural society women and men shared the duties on the farm, although often in ways determined by gender. The industrial society saw the rise of women working in small businesses and in industry. Often women’s low pay and unstable participation in the labour force however mean that their contributions disappear in the statistics. Åmark therefore would rather speak of a patriarchal plural breadwinner model, dominating at least up to the second world war. In this model the man had the dominant role as breadwinner, but the household was also dependent on the income of women and older children. Åmark 2002.


72 Hirdman 1996, 135.
equality contract” (jämställdhetskontraktet), which Hirdman dates from the middle of the 1970s and onwards.

Separate spheres

The early modern gender contract in society thus relied on a division of labour, based on ideas of separate spheres for women and men. There was a public household, where men as breadwinners were responsible, and there was a private household, where women as caregivers had the main responsibility. The integrating forces of modern society, summarised in the idea of equal rights for all citizens, made it possible for women piece by piece to take up positions that had been reserved for men. During the 20th century women in Sweden made their way into the different arenas of modern industrial society. These emancipatory traits become ever more visible during the 1970s. Gender norms had then shifted and new ideals of gender equality were formulated. Swedish society in the 21st century is based on ideals of every individual providing for her/himself. Through this process men’s roles in caring for home and children have also been focused on as a crucial issue.

The description so far might give the impression of a one-way move towards increased emancipation, where the public life of modern society has increasingly been opened up to women, on equal terms. This also seems to be the logic behind Sweden’s international reputation as a women-friendly welfare state.73 A more thorough scrutiny reveals a complex reality.74 One way of interpreting the process is to say that old gender contracts have not disappeared, but rather been renegotiated into new solutions, marked by a remaining gender segregation.75 This is especially visible with regard to caring, where women still take on the main responsibility in both paid and voluntary work. The entrance of women into the labour market has to a large extent occurred within the framework of traditional gender roles. In some respects the roles of private life have simply extended out into the public. This may be exemplified by the dominance of women in the public sector of childcare, health care and care for the elderly.

The Swedish labour market is known to be one of the most gender segregated in the world. By this is meant a horizontal segregation, where men tend to work in some sectors and women in others. In subordinate positions in the health service, childcare, geriatric care, schools and social welfare women often amount to over 80 percent of the employees. At the same time a vertical segregation persists, especially in sectors like universities and the financial world, where the highest positions seem almost completely reserved for men. A recent report from a special commission on the gender division of labour shows that gender segregation is still very strong, although decreasing during the 1990s especially through women’s

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73 Hernes 1987.
74 Borchorst and Siim 2002b.
75 Hirdman 1996.
widening choices of occupation. A persisting problem is the unwillingness of men to take up jobs traditionally held by women, and especially so in the sectors of social welfare and medical care.

Issues of debate

The fact that gender equality is an established value in Swedish society, also regulated by law, should not be interpreted as implying that gender no longer has any significance. Gender equality is seen to be a goal not yet reached. In May 2003 the government submitted a gender equality action plan to parliament. The plan specifies several political goals for gender equality. During the election period 2002–2006 five areas have been given special priority:

- representation; equal access to positions of power and influence,
- equal pay for equal work, and work of equal value
- violence against women, prostitution and trafficking in women,
- men and gender equality,
- the sexualising of public spaces.

As for the first area Sweden is proud to currently (2004) have the highest levels of political representation of women in the world, with 45 percent of the members of the parliament being women. On company boards and in leading management positions the rate of women is however considerably lower and the same goes for women’s representation in leading positions in the system for higher education. Political measures have been discussed in order to force companies to let women into the boards. It seems however already that the threat of political measures has begun to make a change.

Issues of equal pay have to do with the whole area of economic equality, which has received much attention in Sweden. In 1995 the government appointed a special commission, the Commission on Women’s Power in Society, with the task of analysing the distribution of economic power and financial resources between women and men. In this context it is interesting to note that its final report was given a title inspired by the Lord’s prayer. The report “For Thine is the Power. The Myth of Rational Employment and Swedish Gender Equality” showed that the distribution of economic power and financial assets was still far from equal. In working life, women’s and men’s earnings and working hours have tended to converge. But there are still considerable pay gaps between women and men. Women earn only about 80 percent of what men earn, counted for full time jobs. The issue of economic equality also attracted attention in the government proposal for the budget for 2004, which included a supplement on this issue. It states that

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76 SOU 2004:43.
77 Jämt och ständigt, 6.
the unequal division of unpaid labour done in the home, with women doing 58 percent and men 42 percent, sets a limit for the degree to which women can participate in the labour market. Part time work is still much more common among women than men. Two thirds of the women in the labour force work full time, while 90 percent of the men do. Another explanation for economic inequality is the fact that about half of the women in the work force are employed in the public sector, where the salaries are lower, while only one fifth of the men work in the public sector. The governmental study using a hypothetical argument eliminates all other factors except gender, and comes to the conclusion that women’s income still is only 92 percent of men’s. This difference in income can only be explained by gender. In reality women in Sweden however have only 63 percent of the income of men. This is to a certain degree compensated by the welfare system, including taxes, so that women in practice reach the level of 76 percent of men’s disposable income. The governmental report however stresses that differences in income from paid labour are reproduced in the welfare system, as this income forms the basis for most entitlements within the social insurance system including retirement pensions, which are to be realised as long as 10–40 years ahead.

Violence committed by men against women, is along with prostitution and trafficking in women an areas which is high on the agenda in public debate. The laws against sexualised violence are constantly questioned and debated, as they are not seen to give women enough protection. Sweden is also engaged in a joint Nordic-Baltic campaign against trafficking in women (www.regeringen.se).

As early as in the 1970s issues of men and gender equality were discussed, especially in relation to the new law on men’s right to have parental leave, the so called “daddy-month.” Increasingly the role of men in upholding inequalities between women and men has been given attention, partly as a result of the increasing research on masculinity. Among the issues debated are the best ways of encouraging men to stay at home with their children. Political forces stressing the right of parents to choose stand against forces that want to reserve more time for men only in the parental leave.

Sexualisation of the public sphere is an area which has recently attracted political attention. It has to do with the increasing use of women’s bodies in the media, to draw attention to and sell goods or services. Pornographic sites on the internet are also included in this area of attention.

On a more long-term level other issues are included in the political debate on gender equality. Inequalities with regard to gender are for example seen as an obstacle to economic growth. As the demographic situation is reducing the labour force women in active ages will be needed all the more.

A special problem connected to the demographic situation has to do with the lack of interest among young people for work in the health sector in particular. Low salaries and hard working conditions cause young women increasingly to make other professional choices and young men do not replace the young women. Eight
out of ten in the health care program in the upper secondary school are girls.\textsuperscript{81} The authorities try to meet the situation through special programs encouraging for example unemployed men, or immigrant men with medical education, to take up jobs in the health sector.

Specific groups

The final report from the governmental study \textit{Welfare in Sweden. The balance sheet for the 1990s}, assigned by the Swedish government pays special attention to the difficult situation of lone mothers.\textsuperscript{82} From a situation of lower incomes, greater maintenance problems and a higher unemployment rate at the beginning of the decade lone mother were worse off by the end of the decade. This situation may be seen as an example of a new kind of poverty appearing in Swedish society during the 1990s.

Another gender related problem which is debated has to do with the rapid increase since the end of the 1990s in the number of women in particular being off work because of illness. The number of women reporting being ill due to work-related problems doubled between 1998 and 2002.\textsuperscript{83}

Another matter, which has hitherto not received so much attention in public debate, is the situation of elderly women in a situation of continuous economic cutbacks. The economic crisis during the 1990s has however also put new pressures on the welfare system in this respect. The result has been both a decrease in the level of benefits, and renewed pressures on family and relatives to compensate for their absence. The gap is widening between the statement in Swedish law that elderly people are to receive care according to their needs, and the reality of economic resources setting the limits. The gap is often filled by unpaid work done by relatives, mainly female and often themselves elderly. The lack of qualified data documenting this situation has been criticised by gender researchers.\textsuperscript{84} Stark and Regnér suggest the word “reluctant work” to describe this kind of enforced unpaid work, which tends to burden women to a much higher degree than men.\textsuperscript{85}

The academic discussion

Welfare and gender is a relatively strong area of research in the Nordic countries, a fact that mirrors the priority given to gender equality in the political agenda in these countries. A special issue of the Nordic Journal of Women’s Studies in 2002 was dedicated to the challenges to gender equality in the Nordic welfare states.\textsuperscript{86} The editors summarise the issues raised by researchers in this area during the 1990s,
with particular regard to the discussion on typologies of welfare models. They also list a number of key issues for further feminist research. One such issue concerns the extent to which Nordic experiences can be labelled as an ideal model and a route to gender equality that other countries can follow. They also underline the importance of exploring the underlying normative assumptions of the alleged “women-friendliness” of the Scandinavian welfare states.87 Anneli Anttonen in an interesting article discusses the continuing relevance of the universalist approach to welfare issues in a (2000th century 20th or 21st?) context much more marked by diversity than the period of the establishment of the welfare state in Sweden. One of her arguments is that universalism has been based on an idea of citizenship which is not self-evident in a 21st century global context.88

Borchorst and Siim adopt a model introduced by the feminist scholar Nancy Fraser (1997), who divides welfare systems into two main categories; The Universal breadwinner model (Scandinavian) with the employment principle as the norm for both women and men, and The Caregiver-parity model (Conservative), which supports informal care work by women. Both models also appear in feminist form. Fraser however looks for another solution. Her Universal caregiver model is designed to deconstruct the opposition between bread-winning and care-giving. In this way it makes the current life pattern of many Scandinavian women the norm for everyone. Fraser images a social world in which every citizen integrates wage earning, care giving and political engagement as well as involvement in the associational life of civil society. Borchorst and Siim call this a clearly utopian model, that would require a new view of the male role as well as a radical change in the organisation of working-life, but they find the model interesting not least because it addresses what has been called “the caring deficit” in Western society, by which is meant the shortage of caring resources.90

Church influence on gender roles

In Swedish peasant society women were not recognised in their own right, but were regarded as part of a male-dominated household, with strictly divided duties. This order had its religious legitimisation in Lutheran teaching on vocation, which defined the role of women in the household as wives, mothers, daughters, sisters or servants, under the supervision of the housefather. This teaching was most clearly expressed in the “house-table” (hustavla). This had its origin in a range of biblical quotations that Luther had added to his catechism in order to clarify the callings of the different estates. As the catechism was printed in the Hymnal, and taught in the parish catechetical meetings, the knowledge of it became widely spread.91 To what degree it was also observed is however a matter of scholarly contest. Hilding Pleijel on his

87 Hernes 1987.
88 Borchorst and Siim 2002a.
89 Anttonen 2002.
90 Borchorst and Siim 2002b.
91 Pleijel 1970.
The house-table was based on a complementary understanding of gender. Man and woman were seen as having been given separate roles by God. While the role of the man was in public life, the woman had her task in the home, as wife, mother and housewife. In the peasant household the woman, as well as the children and the domestic servants were subordinate to the master. The parish was arranged in a similar way as the household, with the priest as the master, or pastor, for his congregation.

The sharp limits to a public role for women were increasingly challenged from the middle of the 19th century. Roles that for centuries had been necessary for the survival of the household were increasingly challenged through industrialisation and urbanisation. This also challenged the ideology of the Church. The historian Inger Hammar has shown how women in the first emancipation movement reinterpreted Lutheran theology in order to widen the sphere of women out into the public domain. Women living alone in the cities had great difficulties in earning a living. Their possibilities were strongly restricted. As a result prostitution was increasing. But the response on the part of the clergy was not as positive as one may have expected. Luther had taught that the role of *persona publica* was restricted to men. To challenge this order was from the part of the Lutheran orthodoxy seen as offending the order God had created. Inger Hammar has contributed to the understanding of the emancipation movement during this period by allowing for religion not only to play a restrictive and conservative role, on the part of most of the clergy, but also a more positive and encouraging role, primarily through individual women. In years to come the Church was also to open new working possibilities for women through philanthropy, nursing and mission. The establishment of diaconal mother-houses by the end of the 19th century played an important role in this. An important precondition for the changes was the growth of the evangelical revivalist movements especially during the second part of the 19th century. These movements were based on individual conversion in a way that also opened for new roles for women. This religious individualism, along with the ideals of equality expressed by the emerging socialist movements, contributed to the emancipation of women.

Up until the middle of the twentieth century the role of women in the state church was mainly restricted to voluntary work. As early as the 1920s a discussion arose on the ordination of women. This idea was strongly rejected by the ruling bodies of the church. The possibility to be ordained was not opened to women until 1958. Women’s voluntary engagement was strong, but it had no automatic relation to their influence in the decision-making bodies of the church.

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92 The discussion is summarised e.g. in Möller 1997, 137–140.
94 Banks 1981.
95 Rengmår 1982.
organisation of the church was modelled on the public authorities. This gave a strong position to the priests, but very little influence for volunteers. The influence of lay people was instead to be guaranteed through democratic bodies elected by public vote.

The increase in women’s work outside of the home from the 1960s and onwards also challenged the church to undergo change. The last decades of the 20th century thus saw the birth of a wide range of new occupations in church. This development was also made possible thanks to strong finances through the system of a church tax. Many of the new occupations have become as dominated by women as the public sectors of medical and social care. On the other hand the women-dominated voluntary church sectors have witnessed a steady decrease. The number of sewing circles, collecting money for mission and social work, decreased from 4000 to 3000 from 1990 to 2000. The members went from 81,000 to 55,000 and the collected means sank from 58 to 47 million SEK during the same decade. The democratic structure in the church, which has evolved during the 20th century has opened new ways to influence for women. By the end of the century the proportion of women and men was relatively equal in many decision-making democratic bodies, although a certain predominance of men could be seen in bodies with more economic responsibilities.

Church statements on gender and welfare

The democratic bodies of the church opened for a discussion on the position of women and men in church and society by the end of the century. The Equal Opportunities Act also regulates matters in the church to the extent in which the church operates as employer, a fact that encouraged a discussion on principles for gender equality in the church synod. In 1995 a statement was adopted which stated that gender equality is also a goal for the church. The statement was based on a study made on behalf of the Church board covering the situation with regard to gender equality on different levels of the church. The report shows inequalities among women and men in the church in matters like payment, possibilities for career and full employment. On the basis of this study a declaration was prepared for the church synod in 1995. The declaration was adopted as a guideline for further efforts towards gender equality in church organisation. The efforts on the part of the church towards effecting gender equality are, according to the declaration, theologially based on creation and baptism:

It is the task of Christian theology to bring out the will of God and creation as it was meant to be and once again will be. Both woman and man have a natural and full participation in the

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96 Thidevall 2000, 243.
97 Church of Sweden Statistics.
98 As man and woman he created them. Policies on women and men in the Church of Sweden (Till man och kvinna skapade han dem. Policydokument om kvinnor och män i Svenska kyrkan) 1990.
human being as the image of God. - - - In baptism – the new birth of the human being – the equal worth of woman and man is expressed in the affiliation with the Son of God, Christ who came to restore creation.100

The declaration calls attention to evident failures in how the church has been able to effect the mentioned restoration with regard to gender. As employer the church seldom followed the Equal opportunities act on annual equal opportunities plans. Most occupations within the church were also gender segregated in the sense that they were dominated by one sex to a degree of over 60 percent. But there was also a vertical segregation observed in the declaration. Among church employees women were mostly found amongst part-time workers, while men dominated the higher positions.101

The declaration was quite radical for the time in that it clearly stated that the language of the church had contributed to maintaining the inequalities of gender. An exclusive use of male images of God is said to have “contributed to gender discrimination in society instead of clearly bringing out the equal worth of and the interplay between women and men.”102 The declaration concludes that female images of God are also needed. This issue had by this time scarcely been introduced in Sweden, although in other countries inclusive language had been debated for a longer period. By the end of the century the language issues received more attention and were also raised in the official revision of the Church of Sweden lectionary, prayer book and worship manual.103

As for the relation between church and society the declaration stresses that the church as employer reveals how it values men and women through its choice of public representatives. Inequalities in leading positions must be corrected so that the church does not “cement the image of the church as a place where women are the ones partaking in activities, while the men in the best case direct and decide and in the worst case do not take part at all.”104

Apart from the fact that public laws on gender equality put pressure on the church to engage in issues of gender equality there were also internal factors influencing the debate. Feminist theology had begun to enter the Swedish debate in the late 1970s. In the beginning of the 1990s several women were engaged in writing academic theses from a gender perspective. Gender issues were also brought to the forefront by The Ecumenical Decade Churches in Solidarity with Women 1988–1998, proclaimed by the World Council of Churches. The work was done ecumenically, with the aim of facilitating existing women’s projects on all levels in all churches. Although the decade did not become so well known and so well anchored in ordinary parishes it meant quite a lot as a legitimating factor for existing women’s work and also for new initiatives. An important step was taken by the ecumenical arrangement of a conference on gender issues in the city of

100 Quoted in Beckman 1998, 23. My translation.
103 SKU 2000:3.
Härnösand in the summer of 1997. This also meant the beginning of a continuous ecumenical engagement with gender issues which has since resulted in a publication of ecumenically adopted recommendations for cases of sexual harassment in church contexts.\(^{105}\)

In the Church of Sweden the decade also resulted in the establishment of a special position for the promotion of the decade. After the decade the position has been retained with the aim of raising the consciousness of gender issues, especially concerning violence against women and sexual harassment. One example is the translation into Swedish of a publication from the Lutheran World Federation, declaring that the churches repudiate violence against women. The report was a result of a process in Lutheran churches all over the world, in which it had become clear how theological patterns of interpretation may legitimate violence both in close relationships and on a structural level.\(^{106}\)

During the decade a special women’s organisation within the Church of Sweden was established. The fact that gender issues were put on the agenda also resulted in the inclusion of a special gender study within the major study on the role of the folk church made in preparation for the separation of church and state in 2000.\(^{107}\)

Another remaining result of the adoption of the declaration on gender equality in the church synod is that a report on the present situation with regard to gender equality is to be presented to the church synod at the beginning of every election period (every fourth year). After the adoption of the declaration other issues also concerning gender equality have been raised in the synod. One such issue concerned the need for a study on the consequences of theologies of subordination in church life. A conference on this theme was arranged in the autumn of 2001 and resulted in a joint publication by the research department of the Church of Sweden and the theological faculty at Uppsala University.\(^{108}\) The report consists of several essays on the theme from the angle of, for example, biblical exegesis and Luther’s theology.

105 Ekumeniska riktlinjer 2003.
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The Norwegian welfare system

Norway has been a constitutional monarchy since 1814, after the approval of the first democratic constitution. Almost one century later, in 1905, the country gained independence from Sweden. Contemporary Norway is governed by a three-tiered parliamentary system, with each tier governed by a popularly elected body: the national parliament (“Storting”), the county councils and the municipal councils. The Storting has 165 members, and is elected by proportional representation for a four year period. Although formally a one chamber parliament, it splits up into two chambers after elections, and both of them have to approve legislation. The King is formally the highest executive authority, although in practice the government cabinet (“Regjering”) – comprising the prime minister (chosen by the King) and his/her cabinet (selected by the Prime Minister) – is the head of executive power. Parliament members must leave the parliament if they are chosen to serve in the government. In 2004, there were 19 counties and 435 municipalities. County populations range from 76,000 to the approximately 500,000 inhabitants of Oslo. Municipal populations vary widely in Norway, ranging from 218 to 500,000 inhabitants per municipality. There are about 20 municipalities with less than 1,000 inhabitants, and one third have between 2,000 and 5,000 inhabitants.

Politically, the country has been stable, with a dominating Labour Party in office between 1945 and 1965. From 1965 to date, Norway has had 21 additional years of Labour government, intertwined with periods of various conservative-centre coalition governments. Most of the time since 1997, the country has most of the time been ruled by two three-party conservative-centre coalition governments. The shifts in government in the period after the Second World War have not implied significant variations in the welfare policies. Overall, one may say that there has been a consensus on the general principles of welfare policy.

The public welfare system

The Norwegian welfare model

Religious and political history provides an important context for the understanding of today’s welfare regime. Many typologies exist to characterise such regimes. One of the most well known is that of Esping-Andersen.\(^1\) His typology is defined by

\(^1\) Esping-Andersen 1990.
political ideology and the Scandinavian countries are supposed to fit into the category of social democratic welfare regimes (as opposed to conservative and liberal), a typology parallel to or based on Titmuss’s earlier social policy models.\(^2\) Titmuss distinguishes between the institutional, achievement-performance, and residual models. In Titmuss’s system the Scandinavian welfare regimes are characterised by the institutional model of social policy, though e.g. the Norwegian welfare model has significant elements of achievement orientation. This typologisation and categorisation of welfare state regimes have come under much criticism.\(^3\) Even those who criticise Esping-Andersen for his lack of gender analysis tend to end up with welfare state types much like Esping-Andersen’s typology.\(^4\) Here I will leave this criticism aside, just point out the context in which we discuss our case. Against this background it is to be expected that church-based welfare activities, as part of the voluntary sector, will be of little importance, quantitatively speaking.

The organisation of the welfare state

Broadly speaking, the division of responsibilities and duties among the three tiers mentioned in section 1.1 is as follows:

1. At the national level, the parliament serves as the political decision-making body.

   The Ministry of Health and Social Affairs is the executive body with special responsibility for legislation, capacity expansion, budgeting and planning, information management, and policy design. The Ministry of Local Government and Local Authorities is responsible for the distribution of block grants from the state. From 2002 the state is responsible for the delivery of specialised health care services, through regional health care enterprises (see below).

2. At the upper middle level in matters of health care regional units are, since 2002, responsible for planning and provision of specialised health care. This used to be the responsibility of the counties. Norway is divided into five regional units in matters of health care. Each health care region comprises three to five counties. Each region is organised as a health care enterprise. These enterprises are directly subordinate to the Minister of Health (see above).

3. At the lower middle level the counties are responsible for e.g. dental services, cultural matters, and secondary education.

4. At the local level the municipalities cover e.g. the domain of health promotion, primary health care, care of the elderly, care of the handicapped and mentally handicapped, kindergarten and primary school education, social work (child protection and social protection), and local culture.

The years following the Second World War can be described as a continual process of reform in the relationship between state and local government. This process of reform has been present in health and social care, as well as in other sectors. The

\(^2\) Titmuss 1974.

\(^3\) See e.g. Abrahamsson 1997, O’Connor, Shaver and Orloff 1999, Sainsbury 1996.

\(^4\) Morgan 2001.
goal has been to find an acceptable balance of power between these two levels of government. There has been an ongoing process of devolution of central power to local governments, with the aim of focusing as much as possible on the municipal level. The philosophy behind this is that decentralisation is an expression of applied democracy. It brings decision-making closer to those who are affected and promotes popular participation in local political affairs. Moreover, it is believed that delegation of authority usually leads to simplification of administrative procedures. The central authorities are responsible for national policy, for drawing up general guidelines, for advising, and for ensuring that services offered comply with national goals. Maintaining the principle of equal access to public service is a critical role of the central authorities in a decentralised system.

The scope of the welfare state
What distinguishes the Norwegian welfare state, along with the other Scandinavian countries, is the relationship between the public sector and the labour market:

- A large public sector
- A system of “full employment” and a high labour market rate for women,
- A wide-embracing system of more or less universal rights,
- A residual system of social assistance, and
- A comparatively strong element of vertical re-distribution.

What should be added is that retirement age is high (67 years of age), and that the public welfare system does not include public or insurance coverage for dental treatment for persons above 18, with minor exceptions. Compared to the other Scandinavian countries Norway’s public system of kindergartens is not very well developed. The public system is complemented with privately owned and run kindergartens.

One of the ideas behind the Norwegian and Scandinavian welfare model with its system of universalistic orientation is that it protect the members against social risks connected with a normal work and family life. As long as the members are active in the labour market, the national insurance system will protect the individual and the family against poverty. Therefore, active interventions in the labour market, active employment policies, are a central element in the total welfare policy system. The goal of employment policy has been to stimulate the economy in such a way that the demand for labour from economic enterprises will provide job opportunities for everybody, i.e. full employment.

The problem with this system is that it does not provide well for those who are not integrated into the labour market, either because they are not able to enter or they are otherwise excluded. The Scandinavian welfare model, Norway included, does not concur such rights on people by virtue of their citizenship. Since the basic

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5 Furuholmen and Magnusen 2000.
7 Hagen and Lødemel 2003.
8 Hagen and Lødemel 2003.
arrangements (the National Insurance Scheme) are so closely connected to labour market participation the source of income provided by the welfare state for those who are not directly or indirectly integrated in the labour market is the needs-based (residual system of) social assistance.

In 1999 the conservative-centre government put forward a white paper on poverty (SHD 1999) in which its commitment to the welfare state was expressed through the following statements on some basic goals of the welfare state:

- Security for all
- Improved distribution of incomes and living standards
- Equal rights and obligations for all
- An equal range of high-quality services
- Better opportunities for work for the most economically disadvantaged
- A more finely-meshed social safety net

In another connection the main objective in welfare policies is described as to improve the quality of life, social independence and self-reliance for the disabled and the permanently ill. Irrespective of “colour” the governments have ascertained their willingness to maintain strong public responsibility for the welfare system.

The work approach to welfare

A policy of full employment has been a fundamental element in the welfare state during the post-war period. The government has not hesitated in increasing deficits and internal demand during periods of recession in order to maintain a low unemployment level. Oil revenue has made it possible to pursue this policy for longer periods than in other European countries.

The most important measure introduced to integrate unemployed people in the Nordic countries in ordinary paid employment has probably not been incentives and economic motivation systems, but a more active labour market policy, where unemployed workers have had to participate in education and training schemes of different kinds.

The labour market policy in Norway has involved an active commitment by the government in industrial policy. On the other hand, the agricultural sector has been strongly rationalised. However, the post-war governments have committed themselves to maintaining scattered settlements in the peripheries in Southern and Northern Norway, thus maintaining a settlement pattern which is unlike e.g. Sweden. It is natural to see this line of policy as a heritage from the political alliance between the Labour party and the Farmer’s party in the middle of the 1930s, an alliance which refer to the association between industrial workers, small-holders and fishermen traditionally present in the Labour party. The decentralised

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9 St.meld. nr. 35 (1994–95).
11 Norway was late to industrialise. In 2001 20 percent of the gross domestic product came from the North Sea, i.e. through export of crude oil and natural gas (Statistics Norway).
settlement pattern helps explain the expansion of public employment and the labour force from the 1970s and the substantial increase in job opportunities in the welfare sector, in personal social services, education, and health services in the same period.

In Norway the government’s white paper on welfare policies from 1995 declares as a main principle that “social security policy must emphasise that work must be the preference.” One particular challenge has been the high rate of people on disability pension. The Norwegian labour market sees a fairly low exit rate of old workers, both women and men. The high participation rate is partly due to the high retirement age of 67 years; possibly partly explained by the type of early retirement scheme on offer and the way it has worked so far.

The National Insurance Scheme

The National Insurance Scheme is the very core of the Norwegian welfare system. The primary aims of the scheme are:

- to provide financial security by ensuring income and compensating for certain costs during unemployment, pregnancy and childbirth, for one-parent childcare, care of the elderly and in the event of death
- to help equalise incomes and living standards, during the lifetime of individuals and groups of persons
- promote self-support and the best possible daily self-care for each individual

The National Insurance Scheme provides short-term assistance for those of working age, assistance for a transitional period for those who are unemployed for a few years, and permanent assistance for those who have finished their working careers.

Membership in the National Insurance Scheme is mandatory and universal. All residents of Norway or people working as employees in the country are insured under the National Insurance Scheme (NIS). Persons insured under the NIS are entitled to the following benefits: old-age, survivors’ and disability pensions, basic benefit and attendance benefit in case of disablement, rehabilitation benefits, occupational injury benefits, benefits to single parents, monetary reimbursement in case of sickness, maternity, adoption and unemployment, medical benefits in case of sickness and maternity, and funeral grant. Disability benefits comprise basic benefits, care benefits and disability pensions. Rehabilitation benefits are granted if the person concerned has a permanently reduced work capacity or substantially limited opportunities in choice of occupation or place of work. Benefits are also granted for improvements in general functional capacity if this has been substantially reduced due to illness, injury or defects.

13 SHD 1995, St.meld. nr. 35 (1994–95).
14 For a brief and comprehensive overview of the Norwegian welfare system see EC (2002).
16 SOS 2004.
17 Furuholmen and Magnussen 2000. For further details about the National Insurance Scheme we refer to SOS (2004).
Scope and expenditure of the National Insurance Scheme

About 1.1 million persons (about one quarter of the population) get financial assistance from the National Insurance. Just over 900,000 of these receive pensions (old-age pension, invalid pension, or survivor pension), and 100,000 in the form of transitional benefits of different types (rehabilitation benefit, transitional benefits for single-parent care, etc.). About 100,000 persons are granted sickness benefit or childbirth benefit, 70,000 receive unemployment benefit, and 260,000 receive social welfare benefit, cash benefits for invalidity and benefits for childcare, etc. Additionally, there are health benefits financed by the National Insurance, and cash benefits for the disabled.\(^{18}\)

In 1998, total expenditure of the National Insurance amounted to ca. EUR 18 billion, corresponding to EUR 954 per employed person. The areas with the greatest costs were old-age pensions (EUR 8.1 billion), invalid benefits (EUR 3.4 billion) and sickness and childbirth benefits (EUR 2.8 billion).

The NIS is financed by contributions from employer tax (41 percent), National Insurance contributions from employees, self-employed people and pensioners (30 percent), the state (27 percent) and other bodies (2 percent).\(^{19}\) Contribution rates and state grants are determined by the Parliament.\(^{20}\)

The Norwegian health care system

The first professional and official health care system consisted of a network of general practitioners who practised out of their own offices or in the homes of their patients. The first practitioners established themselves during the latter part of the eighteenth century. Norway was industrialised comparatively late and doctors and other medical personnel were rare in rural areas. The majority of the first doctors were public officials, and from 1836 onwards, they were called district physicians. From about the middle of the 19th century, some municipalities also hired physicians who had the obligation of caring for the sick poor. Hospitals started to become institutions to cure the sick around the turn of the previous century. The fact that the country remained poor and that the majority of the population lived in rural sparsely-populated areas was reflected in the health care system into the twentieth century. Historically, the municipalities and local government had strong traditions, a fact which is currently reflected in an egalitarian and locally-oriented culture.\(^{21}\)

The organisational structure of the Norwegian health care system is built on the principle of equal access to services. All inhabitants of the country shall have the same access to services, independent of social status, location and income. To fulfil this aim, the organisational structure has three levels following the political tiers described in an earlier section: the central state, the regional health care enterprise/county and the municipality. The role of the state is to provide national health

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\(^{18}\) SHD 2004.

\(^{19}\) SHD 2004.

\(^{20}\) SOS 2004.

\(^{21}\) Furuholmen and Magnussen 2000.
policy, to prepare and oversee legislation and to allocate funds. The Ministry of Health has the responsibility of implementing the policy at a regional level through the health care enterprises. The main responsibility for the actual provision of health care services lies with the regional health care enterprises and the 435 municipalities.22 The health care enterprises assume responsibility for the planning and operating of the hospital sector (including both general and psychiatric institutions) as well as other specialised medical services, such as special care for alcohol and drug addicts.

Norway’s health care system provides a wide range of services not only in the major urban areas which are concentrated in the southern part of the country, but also in the most thinly settled parts. Apart from socio-cultural and political considerations, this is a reason why, in Norway, the provision of health services has traditionally been in the hands of the public sector. Except for a few specialised private hospitals in the main urban areas, voluntary sector health agencies such as the Red Cross and the church-based agencies, or with a regional focus, are fully embedded in the system. By contrast, a significant private provision of ambulatory health care (physicians, dentists and physiotherapists in private practice) has co-existed with the public system.23 From 2002 this is the responsibility of the regional health care enterprises.

In addition to the hospital sector mentioned above, there is only a small private hospital sector consisting of a few very small private hospitals with outpatient clinics in Oslo – representing less than 1 percent of the total number of hospital beds and 5 percent of the outpatient services provided in Norway.24 These private clinics have specialised in open heart surgery, hip surgery and other minor surgery, in response to long waiting lists for such care at public hospitals (see section 1.3.4). Norwegian law imposes tight restrictions on establishing such private hospitals.

Since 1984 primary health care has been the responsibility of the municipalities (unlike Sweden, where primary care is the counties’ responsibility). Although municipal populations vary widely in Norway, each municipality must (by law) offer services for disease prevention and health promotion, diagnosis and treatment of illness, rehabilitation, and long-term care. Many such medical services are supplied by municipal “health centres,” often including physicians in group practice. Dental care for children and adolescents up to age 18, as well as for disabled persons and patients in nursing homes or receiving home care, however, is provided free of charge by specialised services owned by the counties. The task of running nursing homes belongs to the municipalities and so is, since 1991, the care of mentally retarded individuals.

Financial aspects
Hospital services are financed through block grants from the central government to the health care enterprises. The municipal health service is financed through a

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22 Molven 2002.
23 Noord, Hagen and Iversen 1998.
combination of grants from the local government, retrospective reimbursement by the National Insurance Scheme for services supplied and out-of-pocket payments by the patients. The municipalities, in turn, receive block grants from the central government based on certain criteria.

The National Insurance Scheme fully reimburses all individual expenses for childbirth, treatment of children under seven years of age and treatment of industrial injury. The National Insurance Scheme, which is managed by the Ministry of Health and Social Affairs, also administers the public pension system and other income transfer programmes, such as sickness, disability, unemployment and rehabilitation benefits.

Social care
Social care in Norway includes social welfare services, care for the elderly, the disabled and psychiatric patients, and care for alcoholics and drug addicts. During the past ten years, municipalities have had increasing responsibility for providing health and social care services. This expansion, however, has not reduced the amount of care, in terms of time, provided by family members.

The state defines national goals and draws up the framework for social care services, and provides government guidelines and advice. There are no taxes or charges that are earmarked for special services in Norway. The allocation of resources to different public goods (like health and social services) is mainly a political matter in the parliament, in the counties and in the municipalities.

The basic principle of care for the elderly and disabled is that services and individualised support should be arranged in ways that enable care in people’s home communities. The elderly and persons with disabilities should have the opportunity to live in their own home for as long as possible. Most of the municipalities (80 percent) now provide home care services 24 hours a day.25

It is the responsibility of the municipalities to provide residential care as needed, including nursing homes, service homes and group living for people with senile dementia. The majority of the population in the institutions (74 percent) are 80 years and older. The day care activities include day centres and rehabilitation. The users pay an out-of-pocket fee for some of these municipal services. For health care, there is an upper limit on the yearly out-of-pocket fees. For home care and inpatient care, the size of the fees varies among the municipalities. It is a national debate as to whether there should be national guidelines as to the size of the fees. The fees, however, are supposed to be so low that services are available for everyone. The availability of the care service varies. It is good in the districts and not very good in the larger cities. The quality of care services also varies.26

In general, the municipalities provide the social services, and the personnel working in the sector are directly employed by the municipality. Some nursing homes and day care centres belong to and are managed by voluntary organisations,

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26 Furuholmen and Magnussen 2000.
including Church parishes and other Church-based organisations. However, they are staffed by professionals, and are funded by the municipalities. Up until the present time, very few enterprises involve commercial entrepreneurs.27

The overall need for nursing and care services is expected to increase. This is due to the age structure of the population, and especially the expected increase in the number of elderly people over the age of 80 years (see section 1.3).

Expenditure on health and social welfare in the 1990s
Total expenditure on health and social welfare in 1980 amounted to just under one fifth of the total economy in 1980, but by 1997 this figure had risen to one quarter. This growth mainly occurred in the years before 1992. Since then, the proportion of GNP has reduced a little and has now stabilised.

In the 1990s, the cost of health services and social care for the elderly and disabled had the largest growth. These costs now account for about 45 percent of all expenditure in the health and social services sector. Most of these funds are spent in the municipal sector.

There has been a real growth in the Norwegian economy of over 30 percent in the 1990s. Total health expenditure grew correspondingly. In 1997, however, health expenditure grew faster than GNP. Costs of medicines and pharmaceutical services, and those of medical rehabilitation increased at twice the rate of GNP. This substantial increase in expenditure on medicines is a common trait of health services in many countries.

There was also a notable increase in expenditure on mental health care in 1997, corresponding, in fact, to as much as 24 percent. However, this figure must be considered in the context of general efforts to boost psychiatric services that will extend over many years.

The family in the welfare system
The degree of public intervention in the care of children and the elderly is decisive for the importance of the family to social policy. It has been claimed that Norwegian family policy has its distinctive feature in its combination of ideological individualism and public family policy.28 Certain aspects of the principle of subsidiarity were present in Norwegian welfare policy up to 1973 though the Norwegian welfare system, like that of the other Scandinavian countries, is not based on the principle. In a way the mutual family responsibility was removed with the introduction of the old age pension system in 1936. The system introduced a means-tested individual pension, based only on the individual income, irrespective of children’s income. Until 1964 there was a mutual financial responsibility of children and parents, and until 1973 students’ access to loans and grants from the State Educational Loan Fund was dependent on parents’ income.

Family policy is most often understood as policy to support families with children. Female participation in the labour force has been accompanied by both private and public initiatives to improve professional child care. At the end of 2003 public kindergartens cared for 60 percent and private kindergartens for 40 percent of the total number of children in kindergartens. The total number of children 1–5 years of age made up 69 percent of the whole population in the age group.

Child allowance may be seen as an instrument to strengthen the economy of the family with children. The Norwegian allowance level ranks in the middle of European countries when compared to the income level of the average net wage of a production worker. The parental benefit scheme enables parents to stay at home with their child during the first year of the child’s life. The parental leave period in connection with childbirth has gradually been extended. Parents now receive parental benefits for 52 weeks at 80 percent pay or 42 weeks with full pay. Parents may choose to divide the period of paid leave between them. Four weeks of the total benefit period are reserved for the father (the paternity quota). As to the remainder of the allotted time, the parents themselves may decide whether one of them will stay at home with the child for the duration, or whether they wish to share the leave between them. The weeks reserved for paternity leave are non-transferable, and will be lost if they are not utilised by the father.

The family is still very important as a social support system, but the government and the municipalities have taken over the responsibility for the care of the elderly and children to a great extent. Family policy is closely related to gender policy and this section should be read in connection with the following section on the welfare state in a gender perspective.

The welfare state in a gender perspective

Gender distribution in education and the workforce

The participation of women on the Norwegian labour market is among the highest in Europe. According to the most recent figures (2002), 78 percent of all women aged 25–66 are on the workforce, while the percentage for men is 86. Women have been in the majority in higher education since the 1980s. Close to 60 percent of all students at Norwegian universities and university colleges are women, and more women than men have completed a four-year university or college education. In 2000, women comprised approximately one third of all doctorate degree graduates.

Women with small children are also highly represented on the workforce. In 1965, nine out of ten mothers with small children were housewives. Today the

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30 SSB 2004a.
32 Information on the Ministry of Children and Family Affairs' web-site http://odin.dep.no/bfd/engelsk.
33 Statistics Norway.
situation has been nearly reversed due to the emergence of a strong system of public welfare and an explicit policy aimed at helping women and men to reconcile the demands of family and working life. Particularly important in this context are systems for publicly financed day-care institutions and parental leave (including the paternity quota). The latter provides parents of new children with paid leave for approximately one year.

In 2003 43 percent of all employed women worked part-time, as opposed to only 12 percent of the men. Fewer women and more men work part-time today than ten years ago. The average number of hours of paid work per week is 30.4 hours for women compared to 38.4 hours for men.\textsuperscript{34} Norway continues to deal with the problems of an existing gender pay gap, and wages still tend to be lower in sectors dominated by women employees.

The labour market in Norway is one of the most segregated along gender lines in the Western world.\textsuperscript{35} Almost half of all women employees work in the public sector, and women comprise 67.5 percent of all employees in this sector. In the health and social sector, which primarily consists of public services, 83 percent of the employees are women. In typical private sector professions such as construction and entrepreneurial activity, only 8 percent of the employees are women.\textsuperscript{36}

Table 1. Labour market participation in Norway by age and sex 2002–2003.

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<tr>
<td>Total</td>
<td>73.5</td>
<td>77.4</td>
<td>69.6</td>
<td>72.9</td>
<td>76.7</td>
<td>69.1</td>
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<td>16–19</td>
<td>51.9</td>
<td>49.4</td>
<td>54.6</td>
<td>48.5</td>
<td>46.4</td>
<td>50.8</td>
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<tr>
<td>20–24</td>
<td>74.2</td>
<td>77.0</td>
<td>71.3</td>
<td>73.8</td>
<td>76.6</td>
<td>70.9</td>
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<tr>
<td>25–29</td>
<td>84.0</td>
<td>88.5</td>
<td>79.3</td>
<td>82.8</td>
<td>86.6</td>
<td>78.9</td>
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<tr>
<td>30–39</td>
<td>88.5</td>
<td>93.0</td>
<td>83.7</td>
<td>87.1</td>
<td>91.2</td>
<td>82.9</td>
</tr>
<tr>
<td>40–54</td>
<td>87.1</td>
<td>90.4</td>
<td>83.7</td>
<td>86.7</td>
<td>90.1</td>
<td>83.3</td>
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<tr>
<td>55–66</td>
<td>64.6</td>
<td>69.5</td>
<td>59.6</td>
<td>65.2</td>
<td>70.5</td>
<td>59.9</td>
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<tr>
<td>67–74</td>
<td>8.6</td>
<td>10.3</td>
<td>7.1</td>
<td>9.1</td>
<td>11.0</td>
<td>7.5</td>
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The general lack of women in decision-making positions in both the private and the public sectors continues to be a matter of national concern. The number of women serving on boards of directors and in top administrative positions in the private sector remains small and shows signs of stagnation. Women comprise only 7 percent of the top managerial staff in private companies and 11 percent of the middle-level managers.\textsuperscript{37} Women continue to be underrepresented in the ICT industry, as teachers of technology subjects at all levels and as editors-in-chief of newspapers and other media.

\textsuperscript{34} Statistics Norway.
\textsuperscript{35} Birkeland and Sundnes 2003.
\textsuperscript{36} Figures from 2001, Statistics Norway.
\textsuperscript{37} Figures from 2001, Statistics Norway.
The proportion of women in leading positions in the public sector is somewhat higher. Twenty-eight percent of the top managers in central government administration are women, while the corresponding figure for local government administration is twenty-two percent.

Measures and methods in gender equality efforts
The Norwegian Gender Equality Act was adopted in 1978. The Act prohibits all discrimination on the grounds of gender and is applicable to all areas of society, including education, employment and cultural matters. It also stipulates that public authorities, employers and the social partners are responsible for actively promoting gender equality within their spheres of responsibility.

One of the most important elements of the Act was the establishment of a Gender Equality Ombud as an independent body responsible for enforcing the Act. The Gender Equality Ombud’s services are available to the public free of charge. In addition, the government-funded Gender Equality Centre has been established to monitor, promote and mainstream gender equality and equal opportunity measures in all areas of society.

Pursuant to the Gender Equality Act, it is the responsibility of the public authorities to promote gender equality in all areas of society. A gender mainstreaming strategy was introduced in 1986 and is still being actively applied. It is the responsibility of the relevant public authority to ensure gender equality, e.g. in working life, in education, in the health care system, in terms of social rights, income, etc. A State Secretary commission on gender equality has been appointed as a supplement to the general mainstreaming strategy. The principle of gender mainstreaming has been integrated into Norwegian government budget policy. The aim of gender-sensitive budgeting is to promote gender equality and a fair distribution of public resources, as well as to enhance the effectiveness of service delivery.

The equality paradox: gender and work in welfare society
Norway is reputed to be one of the best countries in the world for women. The UNDP has developed two indices measuring gender equality, GDI (Gender-related development index) and GEM (Gender empowerment measure). On both indices Norway ranks on top of the list. At the same time the labour market in Norway is extremely segregated, as already noted. On the other hand, many women hold central positions in the political system, in the political parties, in parliament, and in the government.

A distinction here may be made between equality of status and of treatment. Equality of status may in this connection be defined as an outcome indicator.
measuring quantitative aspects of equality like distribution of education, positions in the labour market, in the political system, wage level and the like. Equal treatment of the sexes involves opportunities for men and women in the various sectors of social life, in work life recruitment, advancement and promotion, wages and wage increases. Equal treatment does not necessarily lead to equal status.

In Norway, as well as in other Scandinavian countries the welfare state has been important for the labour market participation of women. Economic growth and expansion of the public sector in the 1970s, especially at the municipal level, increased the demand for labour. Old age care, education, social service offices, kindergartens, public administration were organised and expanded everywhere. Many of the jobs created this way were care work, typically “women’s jobs.” The welfare state offered jobs where people lived; paid work was offered to women in the local community.41

“State feminism,” the peculiar form of policy of gender equality in the Scandinavian countries has “the women friendly state” as a precondition.42 The policy implies that a women friendly society would be the result of public policies, family and social policies, and an explicit gender equality policy. This may be seen in light of Esping-Andersen’s basic perspective in his analysis the welfare state regimes that of decommodification.43 A women friendly welfare policy based on the perspective of women in their role as mothers contributes to maintaining a high level of participation by women in the labour force. Through benefits at child birth and cash-for-care (“kontantstøtte”) it is possible for women with children to withdraw from the labour market for shorter or longer periods to care for children without losing their job or significant loss of income. On the other hand, this focus on women as mothers tends to maintain the traditional view of women (of fertile age) as unstable labour, with consequences for the return of their “investment” in the labour market; lower wages and fewer chances of promotion, ceteris paribus.44 On this basis the “women friendly welfare state” has been criticised for being characterised by a “feminism of difference,” emphasising the differences between men and women, and not what they have in common.45 In this respect the welfare state is “gender conservative” as women are primarily defined by their family ties and not as individuals. On the other hand, this orientation may also be seen as contributing to a child friendly state.46

Gender equality in a multi-cultural society

Immigration and multi-culturality pose challenges to dominant understandings of gender equality in Norwegian society. Norway has only recently become a multi-

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42 Hernes 1987.
44 Birkeland and Petersen 2003.
45 Danielsen 2002, see also Leira 1998.
cultural society, more recently than e.g. Sweden. The traditional homogeneity of the Norwegian society has lead to a taken-for-granted perception of the welfare state as based on a sense of a set of common, national norms of solidarity and the idea of a national community. Public policies based on such conceptions have become more problematic in the wake of the influx of immigrants whose cultural ideals may be at variance with dominant values in the Norwegian public discourse. Family violence, forced marriages, and more generally oppression of women among immigrants of non-western cultural origin and how the Norwegian welfare state should deal with this, have been among the recurrent issues in Norwegian public debate and have brought about books taking up Norwegian immigration policy as a topic for discussion.

With regard to gender equality we may conclude that it becomes “more complicated when we no longer relate to a Norwegian, white society. We can assert that Norway is not necessarily the best of countries to live in for those women who are not ethnically Norwegian.”

Welfare state and welfare society

Since the middle of the 1980s the welfare state in many countries has been criticised for standardisation and lack of efficiency. The principle of equality on which the development of the welfare state was built, entailed a standardisation of the services offered. We may perceive this standardisation as a reflection of a society in which experiences in life and work were fairly much the same, characterising whole social classes. What we have seen over the last decades is a new form of society where life and work experiences are more differentiated than before. The existing system of public services is seen as unable to serve diverse needs related to local needs and individual diversity. Public services are accused of being bureaucratic, inflexible, and also expensive (the efficiency argument). Instead, it is argued, a plurality of service providers is needed to serve a plurality of needs. The concept catching the alternative is “welfare pluralism.” A conflict between freedom and equality was stated. Though this criticism first appeared in the Anglo-Saxon part of the world, it has also spread to Norway. We may refer to it as the discourse of freedom and ask how this discourse has affected public policy and the role of the church in particular.

In the early 1980s a critical view of the future of the Scandinavian welfare state was widespread. The welfare state was considered to be in a crisis in the face of globalisation and increased market orientation. It was predicted that the most

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47 Holst 2002.
48 See e.g. Brox, Lindbekk and Skriftek 2003.
50 Rosanvallon 2000.
52 Eriksen 1996.
developed welfare states would be forced to perform substantial cut-backs in order to accommodate the demands of private business to reduce taxes and increase the flexibility of the labour market in an ever tougher international competitive climate.54 Twenty years later we know that the Scandinavian welfare states have survived. Rather than crisis social science research portrays the situation as one of consolidation and stability. The period has seen both increased international competition and expansion of the welfare state. Several arguments can be put forward to explain the development. One argument is that the welfare state was historically developed to protect the vulnerable against the risks of the market, thus, the welfare state came into being because of the market, not in spite of it. Public opinion in Norway has been stable in favour of a strong welfare state along these lines. Another argument is that it has turned out, empirically, that countries with a well developed welfare state have a very efficient and readjustment-oriented economic sector.55

Current and future challenges
Of the many challenges to the Norwegian welfare system which are publicly under debate three have been selected for further elaboration in this report. They have been selected because they rank high in the media and the public debate and represent recurrent concerns in the political and economical debates in Parliament and the Government. In a way they also epitomise problems and challenges to the specific model on which the Norwegian (and Scandinavian in general) welfare system is based.

Rapid increase in disability pensions
The effective age of retirement in Norway has fallen over the past decade. This has been encouraged by the implementation of the early retirement scheme AFP, but also by a considerable growth in the inflow into the disability pension scheme. This pension is granted people who have lost at least half their “income abilities,” i.e. their power to earn their living through wage labour. At the same time there has been a strong growth in the sickness absence scheme. Measures to reduce the strong growth of early retirement, disability pension and sickness leave are the most urgent political priorities in social protection in Norway today.56 Public authorities are concerned about the large number of and growth in new disability pensioners. The rising number of disability pensioners not only increases public expenditure, it also reduces the working population and thus the capacity to finance public welfare. It is a main political objective to reduce the high level of sickness absence and to limit the number of new entries into the disability pension scheme. The problem received

54 Hagen 2002.
special attention in the White Paper on Welfare. The focus of attention is on active measures to enable more persons to engage in remunerated employment. A critical discourse analysis of the white paper concluded that what is set to work in the paper is primarily the welfare state agents and the welfare professions, while the users of the welfare services are in many ways objectified.

The problem for the Government in this case is that there exists a plethora of possible explanations which are difficult to test scientifically. In the public debate a mixture of structural, health and moral factors have been put forward to explain the increase. The political measures taken to prevent further increases have especially concentrated on making it more difficult to come within the scope of the scheme. The long-term development in the number of pensioners seems to indicate that such efforts are inefficient in the long run. The tightening up regards decisions in a field where discretion is important and where the criteria to be used in decision-making have not been very precise. Recently a major Government strategy has been to take steps to make it easier to combine work and pension and to take initiatives to make conditions more favourable for an “inclusive labour market,” i.e. to help promote the chances for those who normally would have trouble succeeding in the labour market.

Poverty as an issue in Norwegian public debate

Poverty is one of the current issues in the Norwegian welfare debate. Eradication of poverty was among the main goals of the post-war government, on the background of the experiences of the consequences of the economic recession in the 1930s. In the wake of the mass poverty experienced in this decade both Norway and the other Scandinavian countries developed a welfare policy based primarily on three elements:

- Poverty is primarily to be explained at a societal level as a structural problem at this level, and should not be understood as a moral defect in the individual
- It is the role of the state to take responsibility to secure the individual and family against poverty
- In the long run poverty will be eradicated through the transformation of the capitalistic class society into a welfare society based on a mixed (market) economy.

In 1979 the Norwegian prime minister from the Labour party expressed that “it is for the first time in the history of this country and the other Nordic countries that we can ascertain that poverty and social misery has been eradicated.” Some 20 years later, in 2001, this former prime minister, now retired, had to admit that “it is a shame that we have seventy thousand poor children in our country.” The year 2001

SHD 1995, St.meld. nr. 35 (1994–95).
Øvrelid 2002.
EC 2002.
Hagen and Lødemel 2003.
was an election year and the new conservative-centre government promised to come up with a plan to fight poverty in Norway. It is interesting that poverty has become a public issue in Norway over the last 5–8 years despite the fact that it is of very limited extent. In this way Norway seems to be peculiar by way of the role poverty claims have come to play in the political debate. In contrast to earlier debates the current debate on poverty has moved the focus away from more or less “unworthy needy” social assistance receivers and their problems to broader groups of “worthy needy,” retired people with only a low pension, i.e. people who have done their duties to society and receive little in return, and disadvantaged children. In many cases the public debate has been based on false premises, like when a former prime minister in the election campaign in 2001 was accused of not having taken poverty among children in Norway seriously. Further studies into the statistical material used in the debate showed it was rather misleading. The debate itself demonstrates that the issues of equality and equity are still important in public discourse. Hagen and Lødemel make the comment that in the public debate the issue is not dressed in arguments of policy of distribution of welfare among groups in society, but rather in arguments of moral appeal to fight poverty. They conclude their reflections on this phenomenon with the comment that in the way the arguments go welfare policy becomes an arena for competing for voters, not for changing the structures of society.

The discourse on poverty has once more revived the idea of a general Guaranteed Minimum Income (GMI). Poverty generating social mechanisms may be so complicated as to make simple political and administrative measures less well suited than before. The roads to poverty have gone from being simple and common to become more complex and individual. The current “welfare contract” which has the duty of work as the central element, provides less safety than before since employment is less secure and the demand for flexibility greater than ever. Existing arrangements to protect against poverty are less accurate with more accidental performance than they used to be, in a more changeable life situation.

An ageing population
In Norway, like most western European countries, changes in demography will continue towards an increasing number and larger proportion of the elderly in the population, i.e. a significant ageing of its population. But the country starts from a favourable position: employment rates of older people are among the highest in the OECD, pension outlays are currently relatively low and substantial financial assets have been accumulated in the Government Petroleum Fund. However, without reforms, due to the maturing of the pension system, ageing will lead to one of the

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62 The plan was developed and made public in the form of a white paper, St.meld. nr. 6 (2002–2003).
63 Hagen and Lødemel 2003.
64 Pedersen and Backe-Hansen 2002.
66 Kildal 2001, see also Øyen 1981.
The dilemma Norway and the other Scandinavian countries now face is: as the standard of living improves and people’s life expectancy increases, there are new challenges with an ageing population and a growing number of people with chronic illnesses. One of today’s health dilemmas is that medical technology has advanced to a level where its ability to perform exceeds what society in general can afford to pay. This poses a new type of challenge in a society where the basic rule for generations has been that medical costs are a societal responsibility.

Medicine will be expensive, and it will require continuous care, rehabilitation and service for the chronically ill and disabled. The result will be an increase in need and demand for health services. New potential areas for treatment will emerge which will increase the pressure on limited resources. This is a question of both technology and expectations of the general public and the medical staff as to what is possible to achieve.

Finally, expectations come from the general growth in wealth and social development. There has been an increased standard of living and an increase in the general expectations of the population. Also, many of the factors affecting the incidence of disease lie outside the traditional domain of health policy, but need to be addressed by the health care sector through health prevention and promotion practices.

The paradox connected to the wealth in Norway’s oil resources in the North Sea is that it cannot be spent too fast without putting too much pressure on the economy and stimulating inflation. This is coupled with a lack of educated and well-trained health personnel like doctors and nurses. Workers from neighbouring countries have contributed to ease pressures in specific sectors, including health care. While the insufficient number of medical doctors has been a problem in rural areas particularly in the north of the country, there are also too few qualified nurses in the cities in highly specialised hospital functions, as well as in other health institutions. With mounting pressure on hospitals to attract physicians, wages for hospital physicians rose sharply in 1996 and again in 2001. However, this has led to a major concern as to how to generate the necessary amount of physicians in primary care, particularly in rural areas.

The other side of this challenge is probably an increased dependency ratio. It is likely that the increasing number of elderly people in the population will be accompanied by a decreasing labour force and a possible shortage of manpower. One way of overcoming this problem is through increased immigration, but so far this alternative seems to meet with a certain resistance in parts of the population and in at least one of the major political parties (the right-wing Progress party). Another way is to reduce or remove incentives for early retirement. Even though retirement age in Norway is 67 years, only 26 percent of those aged 65–66 are in the labour force.

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68 Furuholmen and Magnussen 2000.
69 Furuholmen and Magnussen 2000.
70 Furuholmen and Magnussen 2000.
force.\textsuperscript{71} Antolin and Suyker maintain that there are strong incentives to retire as soon as this is an option and they recommend the removal of such incentives as one of the options to reduce the fiscal impact of ageing.

At any rate, the demographic future of any population is uncertain. The three main determinants are mortality, fertility, and migration. Among those factors the first is the least uncertain. In the case of Norway research on the development of the size of the population and its age composition concludes by emphasising this uncertainty.\textsuperscript{72}

The capacity of the hospital system
The most urgent problem facing the Norwegian health care system is the insufficient ability of both general and psychiatric hospitals to absorb patient inflows. Opinion polls show that long waiting lists and reduced freedom of choice of hospitals for patients is widely considered to be unacceptable. As a result, there seems to be a general impression that the hospital system is undergoing a crisis. As this problem is deemed to undermine the popular support for maintaining a fully public health care system, e.g. by inducing private insurers to create specialised centres for non-emergency treatment, it figures high on the political agenda. A recent opinion poll shows that people’s confidence in the public health system is less than desirable. Almost half the population said they were worried or to some extent worried that (public) health services would not be provided as required when they needed such services.\textsuperscript{73} Still, only about 1 percent of the population is covered today by private insurance schemes.\textsuperscript{74} There are also reasons to believe that the reported waiting times are used strategically by the health care suppliers to obtain more public resources, whereas there are no financial incentives that would motivate the hospitals to shorten the waiting lists or to meet the waiting-time guarantees. Nevertheless, whatever the cause, waiting times have become a major issue in the health policy debate in Norway and are widely seen as unacceptable by the public.\textsuperscript{75}

The Church of Norway

Church and religion in Norway
By the end of the 12\textsuperscript{th} century the Christian church was firmly established in Norway as in the other Nordic countries. Through a decision of the Danish/ Norwegian king in 1537 the Church of Norway, together with the Church in Denmark, received a Lutheran confession and church ordinance. The Norwegian constitution of 1814 confirmed that the Norwegian state, independent from Denmark, would maintain the Evangelical-Lutheran religion as the official state religion and that the King

\textsuperscript{71} Antolin and Suyker 2001.
\textsuperscript{72} Keilman, Pham and Hetland 2001, St.meld. nr. 30 (2000–2001).
\textsuperscript{73} Newspaper Aftenposten 29.6.2004.
\textsuperscript{74} Ibid.
\textsuperscript{75} Noord, Hagen and Iversen 1998.
(later i.e. the government) would have the right and plight to structure and finance the life of the Church in terms of the work of the pastors.

There have been several reforms. Some of the latest are the establishment of a General Synod (1984) and the handing over of the right to appoint pastors from the government to the diocesan councils (1989). Still the Parliament decides the laws and the financial framework for the Church and the government appoints the bishops. Thus, the Church of Norway can be defined as a State church with an Episcopal and a Synodical structure. Since 1845 Christians not of the Lutheran religion have been permitted to organise themselves in public.76

In contrast from the situation in other parts of Europe, the Reformation implied a limitation of national independence. The king used the opportunity to end the influence of the nobility and the bishops (who to a large extent represented the power of nobility more than being educated Church leaders). Thereby Norway lost the strongest Norwegian political institution in the double kingdom Denmark/Norway at that time, the Archbishop. The Reformation stimulated the use of Danish language through liturgy, catechism, Bible-translations and hymns. Although later steps towards national independence implied cutting links to Nordic neighbours, the religious, cultural and political bonds of the Nordic region cannot be overestimated.77

Strong lay movements in the last two centuries organised through domestic “inner-mission” and societies for mission abroad, have shaped the Church of Norway by gathering groups under lay-preachers in “prayer-houses.” The agreement of altar and pulpit fellowship with the Methodist Church from 1997 links the Church of Norway to the Methodist Church of Northern Europe. The Concord from the Leuenburg Agreement (between the Reformed Churches in Europe) was ratified and signed by the Church of Norway in 1999.

State church, religious freedom and religious plurality

Freedom of religion is established by law, and every registered religious and philosophical community has approximately the same financial support from the state, in proportion to their membership. The public school system has a Christian object clause, but the opportunity for religious preaching in school is very restricted. Until recently religious knowledge (Christian knowledge) was obligatory in primary school except for those who did not belong to a Christian denomination. But since the end of the 1990s, in connection with the latest primary school reform this subject was replaced by a new and extended (obligatory) subject covering Christian knowledge as well as knowledge of other religions and philosophies of life. The objective of introducing the new subject was to help pupils familiarise themselves with their own cultural roots and become knowledgeable about other cultural traditions represented in the local community and in society at large. The idea was to support the pupils in developing self-confidence to make it easier for them to meet people embodying other cultural traditions with tolerance and respect.78

76 Church of Norway 2004b.
77 Tveit 2000
78 (St.meld. nr. 32 (2000–2001).
The obligatory character of the subject met with scepticism and was partly resisted by some of the non-Christian communities, by some of the religious lay organisations in the Church of Norway and by the Human Ethical Union. One of the references for the complaints has been the principle of religious freedom in the European Convention on Human Rights whereby “the state, in fulfilling the functions assumed by it in regard to education and teaching, must take care that information or knowledge included in the curriculum is conveyed in an objective, critical and pluralistic manner” and is forbidden to pursue an aim “that might be considered as not respecting parents’ religious and philosophical convictions” (Protocol 1 Article 2).

The new subject was initiated and implemented under a Labour party government and an important reason for the change was for it to contribute to the social integration of Norwegian society. To pass on the cultural heritage of which the Christian tradition is basic, and provide an opportunity for children to share each other’s religious traditions and bring about greater mutual understanding. The subject has since caught the interest of other European countries, like e.g. France, with other traditions with regard to the place of religion and religious knowledge in school.

The Church of Norway is responsible for clerical services in a wide range of public institutions like hospitals, prisons, and the military, but it has been requested that such services also be offered by others for people with other religious or philosophical traditions.79

Most Norwegians (86 percent) belong to the Church of Norway. Among the rest of the population 4–5 percent belong to other Christian communities and 1–2 percent belong to non-Christian religious communities.

The largest increase in membership between 1990 and 2003 occurred in the Roman Catholic Church and in Islam. The most important reason in both cases was immigration to Norway.

The Human Ethical Union

Norway has the largest organised humanistic movement in the world in proportion to the size of the population.80 The Human Ethical Union has 70,000 members which amounts to 1.5 percent of the total population.81 The size of the Union may be interpreted as a reaction against what may be experienced as the privileged position of the Church of Norway as a state church. The Union is among the sharpest critics of the Church and its privileges in Norwegian society and among the strongest voices to emphasise religious freedom with reference to the Declaration of Human Rights. During the last couple of years the Union has also committed itself to raising its voice, not only against what they perceive as Christian fundamentalism, but also against Islamic fundamentalism both national and international.

The Union has since 1951 organised alternatives to the traditionally Church-based rituals like baptism (name-giving celebration) and confirmation (humanistic

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79 Repstad 2000.
80 Repstad 2003.
81 SSB 2004b.
confirmation). As an alternative to a church-wedding, there is the option of civil marriage. Most of the Union’s associations at county level offer counselling in connection with the wedding ceremony and also assistance from a speaker. This service is offered to the couple after the public ceremony at the registrar’s office. From 2004 the legal regulation of marriage has been changed in a way which makes it possible for the Human Ethical Union to have members authorised to conduct civil marriages.

Though almost all burials are carried out by the Church, civil burial exists as an alternative. The burial ceremony is void of any religious ritual or presence of a pastor or any other church representative. The Human Ethical Union also offers its services in this situation, counselling the next of kin, if they have the capacity, providing speakers at the funeral. The Union guarantees such support for their own members. In practice there may be co-operation between the Church and the Union in cases of burial of Union members.

The Pietistic heritage
The strength of the Human Ethical Union in Norway may also be understood in a long-term perspective as an expression of what we may call a religious polarisation in the population as a heritage from the Pietistic movement which held a strong position in Norwegian religious life from the beginning of the 19th century and at least until the 1960s. Religious revival movements which made a clear distinction between “insiders,” the believers, and the “outsiders,” the worldly, characterised the religious tradition in Norway in this period.

As early as the 1700s the Church of Norway came under the influence of Pietism, an individually-oriented Lutheran revivalist movement from Germany emphasising the connection between belief and action. The Pietists made an active effort to incorporate Christian faith and ethics into the life of each individual, for example by introducing the confirmation ceremony (1736) and Folk School (1739). During this period, Norwegian Pietists demonstrated a great interest in missionary activity, particularly as regards Greenland and the Sámi regions of North Norway. From the early 18th century Pietism made profound changes in Norwegian church life. The movement reached the country in the 1730s, faded around 1750 and gained a more permanent foothold through the Pietist-inspired Evangelical revival movements of the 19th century.

Lutheran orthodoxy reigned supreme from the early 1600s, and for a long time, no religion other than the Church of Norway was permitted. A religious revival swept through Norway in the 1800s, as lay preachers – un-ordained evangelists with no clerical training – began to preach the Bible without the approval of official religious circles. A ban on lay preaching was lifted in 1842. The Pietists gained an even stronger foothold through the evangelical revival of the 1800s, and spoke out in protest against what they perceived to be the half-hearted religiosity of ordained clergymen. Thus, unlike the Churches of Denmark and Sweden, the Church of

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82 Information given on the Union’s web-site.
83 Ibid.
84 Church of Norway 2004b.
Norway during this period came to be strongly associated with Pietism and a powerful lay movement. The legalisation of lay preaching also paved the way for a wide variety of Christian free churches.

The autonomous Church organisations for domestic and foreign mission which were established from the 1840s have since represented a strong challenge towards personal commitment to faith and service, in church and society. The northern, partly Sámi, areas of the country, were strongly influenced by the revivalist teaching. Although more ascetic, this branch of Pietism has largely remained less anti-clerical than its southern counterpart.

The ideals of the lay movement and its conservative interpretation of Christianity gradually began to influence the Norwegian clergy. Norwegian Christian circles in the 1900s were characterised by tension between liberal and conservative camps, particularly with regard to their different views of historical research of the Bible. Since the 1980s, however, greater diversity has emerged in relation to church-related and theological opinions.

The power of the revivalist movement had the effect of changing the notion of the Christian from “people at large” to the “personal Christians,” a minority with a strict moral view and a more or less distinct lifestyle, refraining from things like the use of alcohol, playing cards, dancing, films and theatre. The idea was to demonstrate religious identity through (external) behaviour. Pietism was a reaction to what they designated as “conventional Christianity” and it was characterised by emotional sincerity. As a consequence many people started questioning their own religious identity. The Pietistic revivals contributed to religious passiveness and to weaken the position of religion in Norwegian society.85 It probably also resulted in a strong opposition among those who were critical of religion and church, especially represented by the radical intellectuals in the period between the two world wars.86

Church attendance

Church attendance declined markedly between 1850 and 1900, but now varies a great deal. Average attendance is about 100 persons per service, corresponding to 3 percent of the population.87

Church of Norway statistics for 2002 showed that over 44,000 were baptised. This number represents about 80 percent of those born in Norway that year. While the number baptised is declining, the number of confirmations has increased. Nevertheless, the percentage of these represented by confirmation of 14 year olds is somewhat lower than the year before, 68.2 percent compared with 68.4 percent.88 The majority of weddings take place in church, and almost all funerals are church funerals.89

The church rituals, and among them should in the Norwegian case be mentioned the religious service on Christmas Eve, are important mechanisms in maintaining

85 Repstad 2003.
86 Longum 1986.
87 The Church of Norway’s web-site http://www.kirken.no/.
88 SSB 2004b.
89 Repstad 2000.
the folk church character of the Church, and an important reason why many people maintain Christian aspects in their interpretation of life. The Church still plays an important role in public space in times of crisis, like national disasters. It is quite common that religious rituals are part of the symbolic manifestations of mourning and caring in connection with fatal accidents which attain public attention or disasters. In such cases the Church (or maybe more generally religious traditions) has a state of readiness and a symbolic repertoire which still serves an important ritual function in Norwegian society.

Table 2. Percentage of infants baptised in the Church of Norway 1950–2000.91

<table>
<thead>
<tr>
<th>Year</th>
<th>Born</th>
<th>Baptised</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>61,880</td>
<td>59,953</td>
<td>96.8</td>
</tr>
<tr>
<td>1970</td>
<td>64,551</td>
<td>62,094</td>
<td>96.2</td>
</tr>
<tr>
<td>1980</td>
<td>51,039</td>
<td>44,494</td>
<td>87.2</td>
</tr>
<tr>
<td>1990</td>
<td>60,939</td>
<td>50,067</td>
<td>82.2</td>
</tr>
<tr>
<td>2000</td>
<td>59,229</td>
<td>48,023</td>
<td>81.1</td>
</tr>
<tr>
<td>2001</td>
<td>56,707</td>
<td>46,135</td>
<td>81.4</td>
</tr>
</tbody>
</table>

The Sámi minority within the Church of Norway

A long history of political, cultural and religious oppression still leaves many of the northern European indigenous people in a vulnerable and solitary situation relative to the majority societies. Among those peoples that have suffered severe cultural oppression are the Sámi people in northern Norway, Sweden, Finland, and Russia. The General Synod of the Church of Norway in 1997 expressed that it recognised that the public authorities’ norwegianising policy and the role of the Norwegian Church in this context has resulted in infringements upon the Sámi people.92

Religion has been an important part of the Sámi identity. This also applies to the forms of Christianity adopted by the Sámi people. The dominating form is the Pietistic revival movement named after the Swedish pastor and botanist, Lars Levi Læstadius. The revival movement he initiated in the middle of the 19th century has been the most dominating impulse in North-Norwegian church life ever since.93 The Sámi people today make up a significant minority in the Church of Norway and have today their own church council.

The Church of Norway General Synod 2003 stated that the Church is partly responsible for the Norwegianisation process which, during the period 1850–1960, had an impact on Norwegian society’s attitude towards the Sámi people:

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90 Repstad 2003.
91 Church of Norway 2004.
92 General Synod 1997.
93 Aadnanes 1986.
... The Church of Norway also acknowledges that it has contributed to the suppression of Sámi rights and culture ... Reconciliation presupposes openness about perceived injustices on all sides, and the will to change. According to the General Synod’s resolution, the Church of Norway wishes to contribute to these processes.94

As a follow-up of this commitment the General Synod in 2003 made a statement where the Synod expressed their support for the Sámi people in their struggle to have the state accept their rights to land in accordance with international conventions. The Synod more specifically expressed its regret that the rights of the Sámi people so far have not been clearly outlined in accordance with international law.95

The structure and organisation of the Church of Norway

The Church of Norway is one of the few remaining official “state churches” in the world. The King is the constitutional head of the Church of Norway. He exercises his authority through the Government Council of State, or, more precisely, through those representatives of the Council who are baptised Church members. Legislation and finances concerning the Church are passed by the Parliament (the “Storting”).

Article 2 of the Constitution of the Kingdom of Norway declares that “All inhabitants of the Realm shall have the right to free exercise of their religion. The Evangelical-Lutheran religion shall remain the official religion of the State. The inhabitants professing it are bound to bring up their children in the same.” This implies e.g. the King is obliged to confess this religion and that at least half of the members of Government must be members of the Church of Norway. Only these members make decisions in Church matters in the cabinet meetings.

The governing of the Church relies on a double power structure, an Episcopal structure, pastors and bishops, and a Synodal structure where lay people play significant roles through their representation in various councils and committees. The Church of Norway General Synod meets annually. 80 of the 85 delegates are the members of the 11 diocesan councils. The Church of Norway National Council, led by a lay person, is the Synod’s executive body.

The Council on Ecumenical and International Relations is the executive in international and ecumenical matters. The Sami Church Council is responsible for the Church of Norway’s work among the Sámi people in Norway. Central administrative functions are carried out by the Royal Ministry of Culture and Church Affairs.96

There are 1,600 Church of Norway churches and chapels. Parish work is led by a pastor and an elected parish council. The country is geographically divided into 1,298 parishes, 100 deaneries and rural deaneries and 11 dioceses. There are about 1,200 full time pastors and 6,700 employed in other categories. The members of elected parish councils total around 9,100.

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94 General Synod 2003.
95 General Synod 2003.
96 For further analysis of the structure, power and authority in the Church of Norway see e.g. Repstad 2002.
The Church of Norway parish councils are elected by all church members. All members have the right to vote, but only 3 percent participate. Today only members of the parish councils are electing the 85 representatives to the General Synod, but this is likely to be changed in the future to give all members of the Church of Norway the right to participate directly in all church elections.

Since 1989 parish pastors (who had been appointed by the King since 1660) have been appointed by diocesan councils. Bishops and deans are still appointed by those ministers of the Government Council of State who are church members. It has been proposed by a Church Commission that the right to appoint bishops and deans should to be transferred to a church body, composed by the diocesan council and by the General Synod.97

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97 Kirkerådet 2002.
Funding of the Church

Financial responsibility for salaries and the maintenance of buildings is shared by state and municipal authorities. Additional parish activity largely depends on offertory money and voluntary activities.

According to Norwegian church law the municipal councils are obliged to finance a certain level of activity in the Church parishes. In 2002 the total grants from the municipal councils amounted to about EUR 235 mill. In addition the Parliament granted close to EUR 118 mill. which covers clergy salaries and regional and central administrative functions. Annual church offerings contribute around EUR 13 mill. to church activities in Norway and abroad.

The issue of gender in the Church of Norway

Men and women in the church organisation

The first women pastor in the Church of Norway was ordained in 1961. Among the more than 1,200 clergy today, around 12 percent are women (1999). Among the vicars and pastors 13 percent are women. The proportion of women among the rural deans is only 9 percent. The proportion of women applicants to clerical positions was 25 percent in 1999, a significant increase from only 11 percent in 1995. The proportion of women who obtained a post was 23 percent which may be interpreted as an expression of a conscious policy of equality of gender, especially since men are on average senior to women.98

The first woman bishop of the Church of Norway was appointed in 1993 and the second in 2003. Thus, today two of the eleven bishops are women. It is difficult to get precise information on the share of women in other church positions, but it was estimated to be about 40 percent in 1999. A little more than 50 percent of the catechists are women, and 70 percent of the deacons. The proportion of women is significantly lower among organists and churchwardens, while the majority of the administrative staff are women.99 Generally the position of women in the Church of Norway is stronger than in the free churches and the faith-based voluntary organisations.100

Women are better represented in the Synod structure than in the Episcopal structure. Women make up 58 percent of the members of the parish councils after the elections in 2001. In the diocesan councils women make up 43 percent and the proportion of women in the General Synod is about the same.

98 KUF 2000.
100 Repstad 2002.
The issue of gender equality

The issue of gender has first and foremost been thematised at the central level of the Church of Norway through the Church’s participation in the Ecumenical Decade 1988–1998 of the Churches in Solidarity with Women launched by the World Council of Churches in 1987.101 This presentation of the Church of Norway’s views of equality of gender in the church is based on the documents worked out in this connection.

An analysis of the question of gender may be approached in at least two ways, through the question of the role and position of men and women and through the question of how gender is structured more generally. At the Church of Norway General Synod in 1990 a resolution was adopted saying that all councils and committees at the level of the congregation, the diocese and the National Council of the Church of Norway should work towards ensuring that neither sex has less than 40 percent representation. In order to reach that goal the following sub-goals, strategies or measures were emphasised:

- It is important to motivate and educate women to take on the work of leaders on their own premises. In this work, skills which are specific for women should be stressed. It is therefore important to critically evaluate the form of work and style of leadership in ecclesiastical bodies.
- It is important that work in the home, such as caring for children, is taken into account and is more highly valued – a responsibility for both men and women.
- With regard to ecclesiastical positions, the aim is to achieve a more even distribution of the sexes at all levels.
- Women should be encouraged to apply for positions as minister and dean.
- It would enrich the Church of Norway if there were women bishops. At the same time, it is important that every bishop is elected by a clear ecclesiastical vote.
- The General Synod encourages schools of theology to implement measures to strengthen recruitment of women to teaching and research posts.102

As a follow up the General Synod requested the National Council to organise the collection analysis and discussion of women’s experiences of work in ecclesiastical councils and committees.103 This request was carried out and the report was published four years later.104

The General Synod in 1993 as part of its involvement in “Churches in Solidarity with Women” focussed in particular on the role of the diocesan council and encouraged the councils to initiate special courses for the then newly elected women in the councils both at diocesan and the parish level, to work on increasing the number of women in professional and leading positions and requested the National Council to initiate work on sex roles, theology and the Church involving

101 Kirkerådet 1999a.
102 Church of Norway 1990.
103 Church of Norway 1993.
104 Repstad 1997.
both sexes in this work. These priorities were reiterated in later synods. The mainstreaming strategy was expressed, e.g. in the following way, in one of the documents to the Synod:

It is important for the Church to reflect on the breadth of experience that women from different levels of society, different ages, education and professional background have. In order to achieve this, women must have the freedom, support and encouragement they need in order to interpret the message of the bible, to have a theological reflection and to work for the renewal of the Church’s liturgy and proclamation.

The General Synod committee on the Ecumenical Decade emphasised that cooperation between ordained people and lay people, between councils and ministry is a central characteristic of the Church, as an expression of an integral part of the understanding of the church. Lay women hold central leadership positions at all levels within the Church and the Committee underscored the importance “that they receive enough respect to be able to step forward with authority and be more visible both within the international church and in the media.” It was emphasised that the latter is important for the image which the Church projects in society.

The Committee perceived equality not just as a matter of quantity but of mentality; it saw full equality as an obvious and natural part of church life. Therefore the aim should be that the intentions of the Gender Equality Act be carried through to the full. The Committee would oblige the National Council to work with the issues which the Gender Equality Act raises for the Church.

The Norwegian project connected to the Ecumenical Decade has later been subject to several systematic analyses. In one of the studies Lande (2002) concludes that traditional conceptions of man and of God were difficult to change basically in the direction of like-worthiness between man and women and between the female and male. Lande states that there was uneasiness in the General Synod about a conception of God as not solely and exclusively male and that the concept of human like-worthiness only gradually seemed to be being accepted as a substitute for the traditional concept of women as the “second sex” and not only a supplement to it. According to her the concepts of God and man serve as premises for the position of women in the church. Her interpretation of the current situation is that women as pastors and as leaders in the two power structures are still problematic in the Church of Norway. The explanatory factors in Lande’s analysis are that the concept of God is too masculine and human like-worthiness too vague. She finds the view of man and woman in the Norwegian project not quite clear and that the leadership training also had to train for a church where like-worthiness is not evident. Lande

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105 Church of Norway 1993.
106 See e.g. Church of Norway 1996b.
107 Church of Norway 1996a.
109 Church of Norway 1996a.
Eriksen (2004) who has studied the follow-up of the Ecumenical Decade 1988–1998 in the Church of Norway is even more critical. A plan was prepared for the General Synod 1999 where a double strategy was proposed, a mainstreaming strategy and a strategy with a special focus on women’s issues and gender equality as a separate task. In its decision the General Synod left out the part referring to the double strategy which was, on the other hand, incorporated in the decisions made at the General Synod in 2001. However, leadership training for women was not given priority any more, and the financial bid was weakened. Eriksen concludes her study by saying that it is difficult to find examples of a concrete and goal-oriented follow-up of the mainstreaming strategy today. It seems that many people in the Church are geared towards like-worthiness but hesitate in the face of the question of equality, which she interprets as more closely associated with politically radical feminism, a cause not so popular these days.

The issues of equality and non-discrimination of women are basic principles in Norwegian politics and legislation. In the field of religion the Gender Equality Act must be seen in relationship to the freedom of religion provided for in the Constitution. The way the Constitution is interpreted; in practice there are potential and actual tensions and contradictions between them since the Equality Act “shall apply to all areas, except for the internal affairs of religious communities” (Section 2). Thus, where structures and processes in the Church of Norway are at odds with the requirements in the Gender Equality Act Church representatives have defended the position of the Church by referring to the provisions in the Constitution and the exceptions in the Equality Act.

Gender equality and religious freedom

The General Synod committee on the Ecumenical Decade expressed in its document to the General Synod in 1996 that “it is the aim of the Church that the intentions of the Gender Equality Act should be carried through to the full.” The committee underlined the importance for the National Council to work with the issues which the Gender Equality Act raises for the Church. It has been pointed out that women employed in the Church of Norway have experienced discrimination not founded in theology, but rather based on its focus on tradition, family values and a patriarchal structure. This sort of experience of discrimination has been brought to the attention of the public media and many critical voices have been raised against the legal position of the Church as exempt from the requirements in the Equality Act despite its character as a public institution. The Gender Equality Ombud has

111 The project report, Den automatiske likestillingen (“The automatic equality of gender”) has not yet been published.
112 Church of Norway 2001.
113 Church of Norway 1996a.
114 See e.g. Vigerust 1999.
been one of the critics.\footnote{The Gender Equality Ombud wrote e.g. an article on gender equality in the Church of Norway in the newspaper Aftenposten in February 2002 strongly criticising the discrimination of women and its exemption from the Gender Equality Act. My source is the Ombud’s web-site http://www.likestillingsombudet.no/\/.} In his introductory speech to the General Synod in 2000 even the then Minister of Church Affairs, Education and Research criticised the Church for its discrimination against women in matters of appointment.\footnote{Speech to the General Synod in Lillehammer 14 November 2000.}

The role of the Church in the welfare system

What is the significance of the Christian church in Norway as a producer of welfare services,\footnote{This section is primarily based on Angell (2001).} and how can it be understood and explained? These activities are often referred to by the Church as diaconia. The mission of the church in the world is, thus, conceptualised as the preaching of the Gospel and diaconia. One may say that these are but two aspects of the one mission. The definition of diaconia by The Church of Norway reads as follows: diaconia is “the church’s care for fellow human beings and its development of community spirit, and as service which is particularly directed at people in need” both at home and abroad.\footnote{Kirkerådet 1997.} The concept is broad.

Little systematic study has been done of the role of diaconia in the Norwegian welfare state to date.\footnote{Little systematic study has been done of the role of diaconia in the Norwegian welfare state to date. Most of the material available is in the form of case studies and only a few have a quantitative approach. With regard to gender there is even less documentation and only a few studies, historical in their orientation. In this section I will restrict myself to its role in “institution-based” or “residential” care. Research on welfare efforts in the local parish is under way.} Most of the material available is in the form of case studies and only a few have a quantitative approach. With regard to gender there is even less documentation and only a few studies, historical in their orientation.\footnote{Jordansson and Vammen 1998, Martinsen 1984.} In this section I will restrict myself to its role in “institution-based” or “residential” care. Research on welfare efforts in the local parish is under way.

Religion, state and welfare – a historical approach

Social and health work have been an integrated part of the Norwegian church right from the beginning around the year 1000. In the Middle Ages the monasteries were important welfare providers and the Church was given the mandate from the state to undertake organised welfare services provided at the level above the local community.\footnote{See e.g. Angell 1994, Lorentzen 1990, Lundby 1980, Martinsen 1984, Stave 1990, 1996.} The 16th century Reformation changed both the ideology and the practices, though it would be misleading to describe the changes as a revolution in the sense that the Lutheran Reformation represented something quite new with regard to the ideology and organisation of health care and social welfare. Nevertheless, from now on the state formally took over the main responsibility for the provision of welfare service to the people and expropriated the properties and means of production which had been at the Church’s command to perform the
services. An immediate consequence was that the system of organised welfare services broke down. However, the chaos that resulted was only a transition until new structures eventually found their form.

In Norway, like in the other Nordic countries, there was no conflict or rivalry between state and church after the Reformation, the relations between state and church were never regulated by contract. State and church became part of a wider totality. The Protestant Reformation in our countries meant that the state – or rather the king – gained control over the largest organisation in the country, i.e. the Church, thus, making the Church a tool for the state, and the king in his capacity as a Christian principal, to provide for the poor and the needy, took over the traditional welfare duties of the Church. This undoubtedly contributed to strengthening the administrative capacity of the state. But what happened did not imply that the state had its own, independent project, and that the Church was used as a tool in fulfilling that project. This eventually became the case, but during the first couple of centuries after the Reformation, it may be more appropriate to say that the state or the king appropriated the Church’s project and made it its own. This project may be understood as the realisation of the Christian society, i.e. a society where the most important Christian values penetrate society’s institutions and people’s minds and actions. In this way it is difficult to make a distinction between diaconia and public welfare in this period of history. When the state developed its own project, say, in the 18th century, it should still be seen in relationship to the Church, partly as a continuation of the Church’s project, partly in opposition to it.

Against this background the state developed early the capacity to manage a national welfare system that eventually developed into a universalistic welfare state as we know it in the post-war period, i.e. after the end of the Second World War.

The role of the Church in institution-based welfare

Returning to the question of the significance of the church as a welfare provider today, firstly, in Norway, with its state church, this church, The Church of Norway, is not a voluntary organisation, but rather a statutory body. On the other hand, no prescriptions exist for the regulation of the welfare activities of the Church of Norway. In this way, both institution-based and home-based welfare activities organised by the Church of Norway, that which we have called diaconia, may be regarded as voluntary or third sector, activities. What is said about the diaconia of the Church of Norway is even more valid with regard to other religious organisations outside the Church of Norway, which should themselves be considered true voluntary organisations. This way of looking at church based welfare activities is also the way these activities are categorised in Norwegian social science research.

Connecting this with the conclusion in the previous paragraph it is to be expected

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122 Ingesman 2000.
123 Ingesman 2000.
124 See e.g. Lorentzen 1995.
that the church will be of little importance as a welfare agency in the area of institution-based service provision in the health care and social sector.

Thus, voluntary agency theory may be used analysing the role of the church. Useful in this respect are Kramer’s four types of organisational roles of voluntary agencies in the welfare state. Kramer distinguishes between the vanguard role, the improver role, the value guardian role, and the service provider role as his main categories. In discussing the latter, Kramer introduces three sub-categories of relationship between the voluntary agencies and the state, three types of provider roles of voluntary agencies: the primary, the complementary, and the supplementary provider role. As a primary provider the voluntary organisations are alone, or almost alone, in providing the service, i.e. there are at most only a few public providers. As a complementary provider to the public sector, the voluntary agencies provide services that are qualitatively different in kind from those provided by the former. Thirdly, voluntary organisations provide supplementary services if these are similar in kind to those provided by the public sector, “some of which may offer an alternative choice or serve as a substitute for a governmental service,” as Kramer puts it. It is to be expected that the church has different roles in its service provision. With Lutheran theology in mind we may expect church based institutions to have a supplementary role and that minority churches may have complementary as well as supplementary roles.

The integration of church welfare, diaconia, and the public welfare sector may be analysed as a multi-dimensional relationship. One of the dimensions is the economic dimension, connected to the funding of the activities. In this dimension the institution-based diaconia is strongly integrated with the public sector; most of the activities are one hundred percent publicly funded. Because of that, and under a social democratic welfare regime, we might expect the state to use the resource dependence of the church based institutions on the state to determine the role of diaconia according to the perceived needs of the state.

Church based activities make up about 10 percent of the total institution-based activities in the health care and social services in Norway. The category of ‘the church’ in this case includes the majority church, The Church of Norway, and a plurality of minority churches. In 1997 diaconal and other private institutions ran 14 percent of the beds in the institution-based part of the health care and social services in Norway, and the public sector at state, county and municipal level ran 86 percent of the total number of beds. In the private sector the diaconal activities made up 63 percent, that is, almost two thirds. The distribution of the church-based welfare provision is shown in Table 3. The activities exposed in the table comprise more than those of the Church of Norway.

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125 Kramer 1981.
126 Kramer 1981, 234.
Table 3. The work of church affiliated institutions as part of the total institution-based activities in health care and social care in Norway by sub-sector. Beds, 1997.

<table>
<thead>
<tr>
<th>Beds by sub-sector</th>
<th>Church</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Somatic care</td>
<td>1,182</td>
<td>14,991</td>
<td>8</td>
</tr>
<tr>
<td>Psychiatry</td>
<td>407</td>
<td>6,368</td>
<td>6</td>
</tr>
<tr>
<td>Substance abuse</td>
<td>1,338</td>
<td>2,670</td>
<td>50</td>
</tr>
<tr>
<td>Children’s homes</td>
<td>189</td>
<td>1,481</td>
<td>13</td>
</tr>
<tr>
<td>Care for the elderly</td>
<td>2,880</td>
<td>43,377</td>
<td>7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>5,996</td>
<td>68,887</td>
<td>9</td>
</tr>
</tbody>
</table>

To give an idea of the share of the latter a table showing the total activities distributed by category of agency can be seen in Table 4. Roughly the table shows that in total close to 80 percent of the institution-based activities referred to in the previous table were organised by agencies affiliated with the Church of Norway. A more detailed analysis would show that this total or average share conceals a substantial variation between the different sub-sectors.

Table 4. Church based institutions by category of agency 1997. Beds.

<table>
<thead>
<tr>
<th>Category of agency</th>
<th>Beds</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collective agents outside the Church of Norway (CoN)</td>
<td>1,357</td>
<td>22</td>
</tr>
<tr>
<td>Congregations within the CoN</td>
<td>1,558</td>
<td>26</td>
</tr>
<tr>
<td>Organisations/foundations within the CoN</td>
<td>2,973</td>
<td>50</td>
</tr>
<tr>
<td>Private persons</td>
<td>108</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>5,996</td>
<td>100</td>
</tr>
</tbody>
</table>

How can we account for the “profile” or the pattern of institution-based activities in which the church has involved itself? If we take Table 3 as our starting point, keeping in mind that the category of ‘the church’ includes the Church of Norway, and a number of minority churches, the question in particular concerns the following: 1) to take one step back: how do we explain the church’s involvement in institution-based care in Norway with its social democratic welfare regime?, 2) how do we explain the church’s relatively strong involvement in the field of substance abuse rehabilitation?

The answer to the first question must be that diaconia has a thousand year old tradition, a tradition as long as that of the Christian church, as part of an even longer global Christian tradition. This holds true even for institution-based welfare work,
and in all sub-sectors of health and social care. After the Lutheran Reformation and the state or royal expropriation of church property, we may speak of a rise of institutionalised church-based social and health care from the mid and late 19th century. This was during the period of political liberalism when public responsibility for the provision of welfare services came under severe attack. Religiously Norwegian institution-based diaconia was to a high degree inspired by Protestant Germany and the Pietistic movement and its positive view of specific Christian alternatives in health care and social work. This was a period when the state had developed its own project, which no longer coincided with that of the church. Today’s involvement pattern should be seen as a continuation of what grew up a hundred to hundred and fifty years ago.

There is a connection between the answer to the first and the second question. To use Kramer’s typology, the church had a vanguard role, or served as a service pioneer in Norway in institution-based substance abuse rehabilitation. In its service provider role the church to some extent was the primary provider of such services. The church’s involvement in the field of substance abuse rehabilitation must be explained historically. The state’s reluctance to develop care for people, who suffered from addiction to alcohol, made the temperance movement, which to a large extent was religious; establish the first in-patient facilities about a hundred years ago. Since, the state has accepted this primary provider role of the voluntary sector, though the amount of public involvement has steadily increased. The character of the social problem, the way it has been understood and classified, often within a moral or religious framework, may, at least partly, account for the commitment of the church in this field.

The future of the relationships between state and church

On 7 March 2002 a Church of Norway Commission on Church-State relations presented its report, after four years’ work. The (Lutheran) Church of Norway is one of the few remaining official “state churches” in the world. The report “The Same Church – A New Church Structure” concludes that the strong ties between the Church and the State must be loosened, and a new “order” established for their future relationship.

A great majority of the Commission proposed that the Constitution be changed to be in accordance with the multicultural and multi-religious Norwegian society. All passages in the Constitution that specifically mention the Church of Norway or the Evangelical-Lutheran belief should be amended. The report from the Church/State Commission, appointed by the Church of Norway National Council, may enhance the recent change of attitude among politicians in the Parliament on the Church/
State issue. Observers both within the Church and in the media seemed to agree that the strong ties in the Norwegian Church/State relationship will be loosened ten to fifteen years from now. In that case the necessary changes in the Constitution will have to be made by the Parliament in the course of two mandatory periods.

The General Synod decided in 2003 by unanimous vote that the Church of Norway is to continue working on several concrete reforms that do not demand a separation of State and Church. It did not draw conclusions on the question of change in the relations between Church and State. The involvement of local hearing bodies prior to the Synod was a great one. Of the 1,400 bodies that gave a statement criticised, nearly one half answered “no” to the question whether or not they supported the commission’s suggestion of a reorganisation of the Church/State relations. At the same time a great many of the hearing bodies expressed a strong wish that the work on further developing the organisation of the Church must be carried on.

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Welfare, Church and Gender in Finland

ANNE BIRGITTA YEUNG

The Finnish welfare system

Finland has been an independent state since 1917. Industrialisation took place late in Finland. It was not until the 1960s that the country experienced a radical leap in modernisation and along with it came an unprecedented economic prosperity. It was only then that universal welfare provision finally superseded poor relief and Finland joined the other Nordic welfare countries.¹

The Finnish social protection system follows the principles of the Nordic welfare model. The main features of the Nordic welfare state are:

• the principle of universality (the right of all to social protection regardless of where they live, their profession or economic position)
• a strong public sector
• tax funding based on legislative rights of citizens/residents
• equal treatment

The economic, social and educational basic rights are guaranteed in Finland by the state and the municipal authorities. From the perspective of social policy, the right to comprehensive social protection is one of the basic rights.

It has taken several decades to build the Finnish social protection system that is characterised by the universality of benefits. A person is qualified by his/her residence in the country to receive social protection both in Finland and the other Nordic countries. Social protection consists of preventive social and health policy, social welfare and health services, as well as sickness, unemployment, old age and other benefits. The main aim of the social protection is to protect people’s income in different risk situations by providing a comprehensive system of basic security and income-related benefits that guarantee a reasonable standard of living. The social protection also aims to safeguard the working and living environment of the population, ensure good standards of health and working ability, and sufficient income, services and social security at different stages of life. Practically all households at some point or other receive a form of income transfer or use social and health services.² In Finland, all residents are covered by social security schemes, which govern basic pensions (national pensions), sickness and maternity benefits and unemployment benefits. In addition, all employed persons are entitled to benefits based on employment, such as employment pensions and benefits for

¹ Julkunen 2003.
² Ministry of Social Affairs and Health, overall social protection 2004.
employment-related accidents. The basic elements of the Finnish social protection system also include preventive social and health policy, social and health care services, and social insurance. All in all, social welfare consists of a whole span of social services and benefits as well as last resort income support.

**Different agents, different responsibilities**

The duty of the public authorities to promote the welfare, health and safety of the people is stated in the Finnish constitution. The obligation is defined more thoroughly in the Finnish legislation on social welfare and health care. It maintains that all those unable to provide for themselves are entitled to the necessary basic income and care. There are a variety of legislative provisions on individuals’ rights to social welfare and health care services. Secure provision of certain services is considered so important that the legislation gives the individual what is known as a ‘subjective right’ to specific services. These include children’s day-care, certain statutory services for people with disabilities, and the right to emergency medical care. Municipalities are required to reserve adequate funds for the provision of these services in all circumstances. Many social welfare and health care services are, however, based on budget appropriations. This means that individual clients are entitled to these services only within the limits of the funds allocated to them by the municipality in its budget. Thus, services may be targeted at those who need them most. The general principle is, however, that service needs should be assessed on a case-by-case basis, and that simply pointing to a lack of funds is not acceptable as a reason for refusing services. Generally no detailed definition of the quality required of municipal services can be found in the legislation. In many cases, however, the relevant legislation does lay down principles for specifying the quality of services.

The central government, the municipalities and the employers mainly finance social expenditure in Finland. The direct contribution to the social protection expenditure made by the insured is far lower in Finland than in the other EU countries, and the financial contribution of the central government and the municipalities is correspondingly higher. This is a characteristic feature of countries where benefits are based on the principle of universality. In Finland, about 40 percent of the social expenditure is financed by contributions by the employers. Employees’ contributions cover roughly 10 percent. All in all, the state finances almost 25 percent of the social expenditure and the portion paid by the municipalities is 20 percent.

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4 Ministry of Social Affairs and Health, social services and benefits 2004.
5 In social welfare, the general legislation consists of the Social Welfare Act, plus an Act on the Status and Rights of Social Welfare Clients, which entered into force in 2001. The Social Welfare Act states that it is the duty of municipalities to provide general social welfare services, which include, social work, child guidance and family counseling, home help services, housing services, institutional care, family care and support for informal care. ‘Basic security’ and ‘basic services’ are two key concepts, which occur in the law texts. Their exact meaning has not, however, been defined in the law or elsewhere. Statutory social welfare and health care services 2001.
6 Statutory social welfare and health care services 2004.
7 Finnish social protection system 2002.
Themaining 5 percent is financed by property income of funds. A distinctive characteristic of the social insurance system in Finland is that private insurance institutions manage a large proportion of social insurance, although the system is obligatory and statutory.

At the beginning of the 1990s the ratio of social expenditure to GDP rose considerably due to the economic recession in Finland. Economic growth, savings in public expenditure, a drop in unemployment and reform measures have consequently lowered the ratio, and it is now near the EU average. In 2001, the social protection expenditure accounted for 25.4 percent of GDP. However, in 2003 Finland’s expenditure on social protection as a proportion of GDP stood at 27 percent of GDP (euro 38.5 billion), which is still below the average of the other EU countries. If the Finnish purchasing power adjustments are taken into account, social expenditure is among the lowest in the EU countries.

About a third of social expenditure is invested in the older people. The second largest outlay includes sickness and health. Together they consume over half of all the social expenditure, and their share will expand in coming years. The expenditure on unemployment will remain at some 10 percent during the next few years. In the future the amount spent on families with children will drop slightly from the current 12 percent. The expenditure on disability is currently about 13 percent.

Most municipalities have less than 10,000 inhabitants. Municipal institutions provide statutory services, either on their own or along with other municipalities. The most important areas in the service sector are primary health care and specialised medical care, children’s day care, care of the elderly, services for the disabled, social assistance and child welfare. Social assistance is a last-resort benefit. The municipalities can also purchase these obligatory services from the private sector so that private services supplement the public services. The municipalities play a key role in providing social and healthcare services, and they finance about 70 percent of the costs of providing these services. State subsidies contribute a fifth of these costs, and client payments cover the remaining 10 percent. The social services and income support systems are organised by each of Finland’s 448 municipalities. The municipalities are also responsible for arranging other basic services like schooling.

All in all, the profit responsibility of the Ministry of Social Affairs and Health related to social welfare and health care services is largely implemented through organisations other than those which are part of the state administration, mainly through municipalities and joint municipal boards. This situation is challenging from the point of view of steering: how to achieve the nation-wide objectives and at

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3 Concerning the state budget, the share of the Ministry of Social Affairs and Health is about one fifth, as a part of expenditure is financed via other ministries, such as the Ministry of Labour. The largest outlays made by the Ministry of Social Affairs and Health are in the form of transfers to households, municipalities or groups of municipalities. Ministry of Social Affairs and Health, promoting social welfare 2004.
5 Ministry of Social Affairs and health, promoting social welfare 2004; Finnish social protection system 2002.
6 Ministry of Social Affairs and Health, promoting social welfare 2004.
7 Ministry of Social Affairs and Health, social services and benefits 2004.
the same time to maintain real municipal autonomy. The policy of steering social welfare and health care has progressed in Finland from a strict steering by rules, through a dismantling of the detailed steering to stressing steering by information and, on the other hand, the fundamental rights of citizens.13

Finland, like other Scandinavian countries, can be described as the promised land of associations.14 Today, the typical Finn is a member of three foundations or associations. There is an average of one association per 50 citizens. Very popular associations in Finland include culture, sports and leisure, as well as trade unions.15 Finnish associational life differs in certain senses from the Scandinavian tradition. For instance, the Finnish associational roots and traditions are more pietistic and less liberal and Anglo-Saxon than Swedish ones.16 What is also unique to Finland is that most religious revival movements have remained within the church. Associations also play an important role in the provision of social welfare, in the church context. For example, the biggest group of church associations represent social work.17

According to the latest sociobarometer,18 services of welfare and health have lately been largely reorganised. This also means an increase in regional cooperation. Currently approximately 90 percent of health-care centres already buy services from private companies. Nine out of ten social offices buy services from private companies and organisations. A third of those interviewed for the sociobarometer considered that competition between service providers has negative effects, a fourth found the influence positive. All in all, the role of the third sector and private sector increased in the Finnish social welfare system during the 1990s. Yet this growth has been moderate.19

**Historic background**

Traditionally the church carried out a number of public duties. In addition to worship and religious rituals, the church managed aspects of local administration and social welfare. It also played a central part in the development of the school system. The traditional Finnish peasant communities had an undifferentiated social structure: a small number of institutions performed a large number of different tasks, and the church in particular had extensive responsibilities. As a result of societal differentiation, several of the tasks the church was responsible for were taken over by the state and the municipalities. In this regard the developments in Finland have corresponded to comparable tendencies in the other Nordic countries.20

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13 Oulasvirta et al. 2002; in response to the problems this study outlines “an ideal model of balanced steering”. For this purpose, specific tools have been developed “comprising an analysis of the starting points for steering, a decision-tree analysis and a risk analysis of steering instruments”.
15 Helander and Laaksonen 1999.
16 Heininen & Heikkilä 1996.
18 Sociobarometer 2004, 5.
19 Saari 2001, 70.
As Finnish society went through the first phases of industrialisation and urbanisation in the 19th century, new challenges and novel citizen activism arose. Changes affected urban areas, the centres of the rising associational activity, first and most abruptly. One example of the new movements is the charity associations of middle and upper class women, the most important form of private charity until the 1880s. Women’s charity associations were one of the few ways for women to participate in social life. The economic and social transition accelerated towards the end of the 19th century, as Finland also experienced a boom in associational life. The popular religious revival movements had been the ideological pioneers of voluntary associations. The associations emphasised individualistic thinking and questions of language and nationality, followed by issues of social status and equality. A new phenomenon in the social work of the late 19th century was the activity of people from lower classes. The concept of charity was avoided and social work activity referred to as private welfare work. In the church context, associations were established for Sunday school, youth work, as well as home mission and social work. These associations were mixed gender-wise and also included participation of thousands of women.

As the war between the Soviet Union and Finland began in 1939, it brought numerous social and economic problems. Both volunteers and the public sector did social work under these exceptional conditions. New organisations were founded and people were prompted to help others, but the role of the public sector grew larger than ever as professionalism in social work increased.

After the war and the supervening period of re-building, the living standard in Finland rose rapidly with economic growth and rising employment. The state was now able to offer a more extensive system of social security and most of the previous unofficial work became the responsibility of the public sector. Welfare state construction was nevertheless slow. The post-war economy had rapid cycles of growth and decline. Critical attitudes also slowed social policy reform, controversy between liberal and conservative views persisting in Finland much longer than in other Nordic countries. The final breakthrough in social policy only occurred by the late 1950s and early 1960s. The time period in which the proportion of agricultural population fell from 50 percent to 15 percent was 30–40 years less than

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23 Jaakkola 1994a, 143–144.
26 Satka 1994; Urponen 1994; Aho 1991. The ideal of social services as an equal right of all citizens came from keynesian economics policy, and the practical models for Finland were both Scandinavian and British.
As the welfare society developed, the role of citizen activism and associations was called into question. The advocates of state-centred social policy thought the time of associations was over or, at the most, that volunteering could be considered a hobby of empathetic people. Those who defended associations accorded them an important role in interpreting people’s needs, channelling new ideas and flexibility, and offering services that the public sector did not.28

In Finnish social policy and economics, the 1970s and 1980s saw the construction of a strong welfare state, so that social-democratic values are now high on the political agenda. There have been contradictory views about whether the welfare state might weaken civic participation, volunteerism, and societal altruism – elements of social capital – and whether it might erode church social work and even the overall status of the church itself.

A peculiarity of the Finnish context is the effect of the international recession of the early 1990s. The depression hit Finland harder than any other developed market economy since the Second World War.29 The main causes behind this recession in the Finnish economy were expansion of the public sector, the collapse of eastern exports, the recession in Western Europe and, specifically, the overheated domestic financial market.30 Unemployment increased rapidly from 3.5 percent to 18 percent in 1994. State tax revenues shrank while expenditure grew. The result was a sharp increase in the state debt.31 During the depression, the need for income transfers and social services grew and the criticism of the cost of the welfare state increased. In comparison to Sweden, which also suffered from a severe economic depression, Finland experienced a much steeper macro-economic decline and far more pronounced growth in unemployment. The increase in social assistance recipients in Finland during the 1990s was almost 100 percent. In Finland expenditure cuts exceeded tax increases, so that cuts in social services were more severe in Finland than in Sweden.32

During the depression, the non-profit sector and church social activities were recognised as a means of filling the gap in the services that the public sector had created by cutbacks.33 Since every third Finn currently volunteers, these activities have remained popular.34

All in all, it has been concluded that neither Finland nor had Sweden underwent major changes in terms of citizens’ well-being of financing structures after recession, thanks to the good state of public affairs prior recession. However, in

32 A Swedish report, “Two of a kind” (2000) has compared the development of the welfare state during the 1990s in Finland and Sweden.
34 Yeung 2002.
terms of public debt and employment rates, Finland and Sweden seem to have been forced into the European patterns of social policy; they have lost, to certain extent, their distinctiveness among the EU countries.35 Altogether, in the latter half of the 1990s, Finland was able to become the most competitive economy in the world and also to preserve welfare state. Finland is a good example of a society of information and technology combined with high social security.36

The following table summarises the roles in the provision of the welfare through centuries:

Table 1. The roles of the public sector and the church context in social work37

<table>
<thead>
<tr>
<th>Time Period</th>
<th>THE PUBLIC SECTOR (The state and the municipalities)</th>
<th>THE CHURCH CONTEXT</th>
<th>THE CHURCH ASSOCIATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>18th and early 19th century</td>
<td>Insubstantial</td>
<td>Moderate</td>
<td>-</td>
</tr>
<tr>
<td>Late 19th century</td>
<td>Strengthening</td>
<td>Diminishing</td>
<td>Strong</td>
</tr>
<tr>
<td>Early 20th century</td>
<td>Strengthening</td>
<td>Strengthening</td>
<td>Diminishing</td>
</tr>
<tr>
<td>1940s and 1950s</td>
<td>Strong</td>
<td>Strengthening</td>
<td>Marginal</td>
</tr>
<tr>
<td>1960s</td>
<td>Strong</td>
<td>Diminishing</td>
<td>Further diminishing</td>
</tr>
<tr>
<td>1970s and 1980s</td>
<td>Strong</td>
<td>Marginal</td>
<td>Strengthening</td>
</tr>
<tr>
<td>1990s</td>
<td>Diminishing, yet strong</td>
<td>Strongly strengthening</td>
<td>Diminishing</td>
</tr>
</tbody>
</table>

Current challenges and debates

Even during the recession of the early 1990s, the basic structures of the welfare system remained intact as no major reforms were carried out. Nevertheless, social security was cut back and services were required to become more proficient in an array of small ways, and many underprivileged groups, such as mental health patients, alcoholics, long-term unemployed and single parents learned that they were worse off than before. Since 1995, the excellent economic growth has made prospects brighter, though unemployment has remained high. Nonetheless, the 1990s brought about changes in direction. In welfare policy the emphasis shifted from human values and equality to economic factors such as efficiency and profitability. Competitiveness became the main priority for the state. Indeed, over the past few years Finland has become known not only for its egalitarianism but also for its leap into the front line of information technology and the information

35 Kautto 1999.
37 Yeung 2003b.
society. Simultaneously, Finland has been affected by a common trend; after many years of equalisation, income disparities have begun to increase yet again.38

The general economic development trend in Finland has been mainly positive during 2000–2001. The only evidence remaining of the recession of the early 1990s is structural unemployment, which continues at a high level,39 and the relatively large national debt. However, the state finances still have a reasonable degree of flexibility. This has made it possible to accomplish many of the social and health care reforms that have been carried out during recent years. Major issues that have emerged are on one hand the growth of differences between different regions of the country, and on the other hand the increase in income differences and the risk of social exclusion. The government has dealt with the issue of regional development by launching new kinds of regional policy projects, by promoting the development of municipal federations and regional centres. The government has also increased its efforts at combating the danger of exclusion e.g. by the introduction of the so-called poverty package.40 Decentralisation is also taking place in Finland. So far, the aim is rather to ensure “greater flexibility in working hours” and to promote local contracts and partnership.41

In April 2001, the Ministry of Social Affairs and Health published ‘Strategies for Social Protection 2010 – towards a socially and economically sustainable society’, a strategic document outlining the social protection strategy for the next ten years. Four strategic lines at the core of the social protection reform are as follows:

- promoting health and functional capacity;
- making work more attractive;
- preventing and combating social exclusion;
- providing efficient services and income security.42

The above strategic lines emphasise improved cooperation between primary health care and specialised health care, improved efficiency in occupational health care, support for the general functional capacity of people in different age groups, promotion of lifelong learning, and various themes in environmental health. Other areas highlighted include well-being at work, increased gender equality, and social protection, which provides an incentive to work. Additional areas of emphasis cover giving priority to preventive policy, early intervention, actions to interrupt long-term unemployment, reducing regional welfare gaps, promoting multiculturalism, controlling substance abuse, and active participation in international policymaking.43

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39 In December 2003, the unemployment rate in Finland was 11.9 (Työllisyyskatsaus 2003). In March 2004, of the unemployed job applicants, 161,600 (56 percent) were men and 127,000 (44 percent) women (Employment bulletin of the Finnish Ministry of Labour 2003).
41 Raveaud 2002, 273, referring also to the National Action of Finland, 1998.
42 The Finnish social protection system 2002.
Furthermore, according to the Ministry of Social Affairs and Health, the main domestic challenges for social policy in the coming years are:

- to achieve a balanced national economy
- unemployment, especially long-term unemployment
- demographic changes and changes in family structure
- the employment rate and maintaining work ability
- the care and services needed by an ageing population
- availability of sufficient competent personnel in the social and health care sector
- the projected expenditure on social and health care services
- poverty and social exclusion
- sustainable financing of social expenditure
- the new information technology.\(^44\)

Finland is one of Europe’s fastest ageing countries. In 1999, 15 percent of Finland’s population was over 65 years of age. According to demographic forecasts, in 2020 a fifth of Finns will have reached 65 years of age. From 1999 to 2020, the number of people over 80 years of age is expected to increase by about 50 percent. Together with the smaller younger age classes, this development trend will mean great changes in the age structure of the population: the pyramid is turned upside down.\(^45\)

Almost a third of all social expenditure is spent on old age. The second largest category of expenditure is illness and health. These two make up over a half of all social spending. Their share will continue to rise in the years to come. The share of unemployment expenditure will remain around 10 percent during the next few years. According to a survey made in EU Member States, nearly 80 percent of Finns are either very satisfied or satisfied with the state of health care in the country. The percentage is the highest among the EU Member States. Total health care expenditure in Finland in 1999 was still below the EU average; measured both as a proportion of GDP (6.8 percent) and in terms of per capita spending.\(^46\) The main concerns in health care include chronic illnesses brought about by personal habits and age, and the premature deaths they cause. Illnesses lead to early retirement and in particular keep the men’s mortality rate above the average in Europe. While the Finnish women usually outlive their men, they have more illnesses and health-related complaints than the men. The difference between the life expectancies of women and men has been one of the highest in the industrialised world, and the gap is closing very slowly.\(^47\)

During the last few years, considerable changes have occurred in the operational environment and workings of the health care system. The service system has become more outpatient care-orientated. The systems of health care, finance and

\(^{44}\) Due to structural reforms in the pension system and curbs on public spending and the better employment situation, the financing of the system for these challenges is now on a firmer footing than during the recession in the early 1990s. The Finnish social protection system 2002.

\(^{45}\) Types of Social welfare in Finland 1999; Finland is ageing 1999.

\(^{46}\) Trends in Social Protection in Finland 2002.

Another challenge for the Finnish social protection system is the long-term dependency on social assistance. The number of social assistance recipients has, to some extent, fallen in recent years, but costs have not decreased. The economical situation of the households who have long relied on social assistance has gone from bad to worse. The long-term unemployed must increasingly rely on social assistance, which originally was intended only as a last resort, for extended periods of time. The latest social assistance reforms have been carried out with the aim of encouraging the acceptance of work and taking the need of added support better into account, by increasing the amount of preventive social assistance.  

As far as gender is concerned, the recession did not mean the great setback for the welfare state and gender equality that some feared it would. But the 1990s did leave a legacy. Finnish society as a whole is now tougher and more adversarial than ten years ago and the state seems to be less women-friendly than it was at the start of the 1990s. The 90s also brought about greater neutrality on the gender issue. It became less politicised and less talked about. Three trends, that affect the position of women in the labour market the most, began in the 1990s. First, an increasing number of jobs in the public sector are fixed-term jobs, and second, unemployment among women has risen above that among men. In 1998 the female unemployment rate was 12 percent, the male 10.9 percent. And finally, the unemployment of mothers with young children, especially single mothers, has risen more than that of the other population groups. The negative effects of these changes are noticeable as weakened social protection for women and lesser possibilities for taking advantage of the parenthood leave. The proportion of mothers receiving the minimum parenthood allowance has risen from 6 to 27 percent.  

Nowadays Finland has one of the highest unemployment rates in Europe. It affects both men and women, though not quite to the same degree. After the recession, male unemployment fell faster than female and now female unemployment is slightly higher than male. In spite of Finland’s egalitarian image, the position of women in the labour market is by no means equal to that of men. Even the well-educated women earn on average 20 percent less than the men at the same job. In the labour market there is gender segregation and the glass ceiling quickly rises over women seeking after the top positions. Therefore, it is difficult for women to attain top positions in public administration or business life and women’s jobs are often more precarious than men’s, and consequently women feel more insecure at work than men. Moreover, in the 1990s some of the negative aspects of work, such as the pace and pressure of time, became more pronounced in women’s jobs.  

Altogether, the basic structures of society have undergone radical changes over the last ten years. People have increasingly gravitated towards the main cities and urban areas to live, as well as to the residential areas of municipalities. Changes in working life have created new labour markets and working relations. One consequence of the recession of the 1990s was that the social and health policy environment encountered more risk factors than could have been foreseen. The increased risk of losing one’s job showed that paid work and future security could not be taken for granted. Although the livelihood of the population as a whole was not greatly damaged due to the recession and the cuts in social spending, exclusion has become a diverse phenomenon - because of unemployment and indebtedness, insecurity, uncertainty and helplessness are reflected especially through the situation of children and young people. The universality of social and health services has until now been adequate. But services are undergoing upheavals. According to the social policy documents, there is a special need to develop new types of open services at the municipal level. One aim of social policy is to improve attentiveness, from the angle of social welfare and health, in all existing areas, planning and action programmes. This requires the development of common methods, such as in community building, housing, and employment and training policy.53

Under the principle of subsidiarity, social policy making belongs to the Member States. Nevertheless, the European Union is increasingly the working environment of social policy. While the main impact of the EMU is clearly positive with falling interest rates and the economy expanding, the risk of asymmetrical shocks is nevertheless still existent within the framework of the Stability and Growth Pact. The entry into force of the Treaty of Amsterdam reinforced the social dimension at EU level. The Treaty of Nice will further strengthen the position of social policy, as it includes confirmation of the legal basis of the new Social Protection Committee (art. 144). Common challenges shared by the entire Union include raising the employment rate, combating poverty and social exclusion, an ageing population and sustainable financing of the pension systems and health care. The fundamental question is how to effectively combine macroeconomic policy, employment policy and social policy. Improving the social dimension of the EU implies better coordination of national policies and strengthening the common framework for European social policy.54

Two specific challenges, concerning European Union, for Finland are: how to protect the national social politics from the increasing pressures and influences of politics of economics and employment policies. Furthermore, the recent entry of Estonia into the European Union will likely to cause both positive effects and

54 The Open Method of Coordination (OMC) is a new form of cooperation at European level that integrates national diversity and European unity in a potentially fruitful way. It is a key element of the Lisbon Strategy accepted by the Lisbon European Council in 2000. Under the OMC, Member States can set common objectives and agree follow-up indicators, reporting and benchmarking. So far, such common objectives have been agreed in the areas of poverty and social exclusion, pension policy and health care. The Finnish social protection system 2002.
challenges for Finland as Estonian polices on tax and social security are very different from the Finnish ones.55

The role of the church in the welfare system

**Finland – country of two folk churches**

The status of the Evangelical Lutheran church of Finland has gradually changed from a state church to a folk church already in the second half of the 19th century.56 Freedom of religion came into effect in 1923. It granted the citizens the right to freely establish religious denominations or to remain entirely outside of them. The state no longer affirmed the Lutheran faith, thereby assuming a fairly neutral attitude to religion. The church of Finland has an independent relation to the Finnish state. The legal status of the church is defined in the Constitution and in a separate Ecclesiastical Act. The relationship Church. Nevertheless, both the Evangelical Lutheran and the Orthodox Church still have duties that could be performed by either the state or the local government. The parishes keep local population registers of their members, and people belonging to other denominations and those listed on the non-denominational population register are buried in the more than one thousand cemeteries maintained by the Lutheran and Orthodox parishes.57 Altogether, the church and the state in Finland have a mutual understanding concerning the fact that the parishes take care of certain common duties.

Lately, the new law on religious freedom, in force since 1.8.2003, has made, for instance, resignation from the church much easier; a free form, posted notice is sufficient. The effects of the new law remain to be observed in near future.

**Belief and belonging**

The Evangelical Lutheran church of Finland has long been one of the traditional points of reference in Finnish society. To a large extent, the Christian identity and the Lutheran identity go hand in hand in Finland. In a 1996 survey, 80 percent of Finns considered themselves to be Christians, and 78 percent identified themselves as Lutherans. In some sectors of the population – among pensioners, for example – the percentage of those identifying themselves as Lutherans actually exceeded the proportion of those identifying themselves as Christians.58 The overall Finnish religious environment is still intriguingly homogenous, 85.1 percent of Finns being members of the Evangelical Lutheran church at the beginning of the 21st century.

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56 E.g., Björkstrand 1990, 17.
57 Kääriäinen 2002.
Altogether, Finland has quite high levels of private religiosity (e.g. private prayer and belief in God), but only a small minority of Finns (8 percent) are monthly churchgoers. Indicators of religiosity such as churchgoing, Bible reading and prayer have decreased in recent years. The church is increasingly perceived as one sector of society among others – a sector whose task is to perform religious services. The position of the church as the basis of shared values is no longer taken for granted. The Finns are less active churchgoers than many other Europeans. In particular, the proportion of those who attend on a weekly or at least a monthly basis is low by European standards; it approximately corresponds to the levels found in the other Nordic countries and Russia.

About a half of the Finns (47 percent) say they believe in God as taught by Christianity. A further 27 percent say that they believe in God, but not in accordance with the teaching of the church. The proportion of those believing in God as taught by Christianity increased significantly over the 1990s. In addition to the main Sunday service, the parishes arrange a wide variety of other services, including school services, confirmation services, evening services and vespers, children’s services, and non-traditional services. Approximately 23,000 such services took place in 2000, with three million instances of attendance – a higher figure than ever before. Religious television programmes and radio broadcasts are watched or listened to by the majority of Finns. Altogether, the trend in Finland has in recent decades been towards declining public religiosity, but continuing, even increasing, private religiosity, which illustrates Davie’s notion that institutional religious decline is not necessarily accompanied by decline in belief.

Church ceremonies enable the parishes to come into contact with almost the entire Finnish population on an annual basis; 89 percent of all infants are baptised, only about 2 percent of Finns are buried without a church service, and as many as 8 percent of couples are married in the church. Altogether, church ceremonies were attended in 2000 by a total of 4.4 million people, so that almost every Finn attended, on average, one such ceremony in the course of the year. In addition to services, the parishes organised approximately 100,000 other public events in 2000, including musical events and devotional meetings. The total attendance for all these events was about 6.3 million. During the recent years approximately 90 percent of all fifteen-year-olds have taken part in confirmation training. The percentage of those attending confirmation schools has remained noticeably higher than the percentage of those who are members of the church. About 2,000 fifteen-year-olds have joined the church annually. The popularity of confirmation camps has continued to rise: nine out of ten youngsters choose this option in preference to

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59 Niemelä, 2002b, 141–143; Salonen et al., 2000; 2001, 19. Like other Nordic citizens (Bäckström 1993), particularly belonging to the church is experienced meaningful by Finns.
62 School services were by far the most popular of these special services, with a total attendance of about a million in 2000. Kääriäinen 2001.
63 Kääriäinen et al. 2003.
All in all, Finns are pleased with the way church ceremonies are carried out. In 1999 as many as 94 percent of the Finns took the view that baptisms, marriage services, and funeral services were carried out either very well or fairly well. In recent years parishes have introduced various new rites relating to other transitions in life, too. For example, the majority of parishes arrange special school blessings for children starting school.66

For the Finns, the most important reason for belonging to the Lutheran Church is church ceremonies. Equally important is that the church maintains cemeteries. The majority also find it important that the church assists the elderly and infirm, and teaches moral values to children and young people. Even for those who contemplate leaving the church, the rituals and the social work of the church are strong factors in favour of staying a member. In addition, they find it important that the church comes to the aid of the elderly and infirm. The number of those voluntarily joining the church has increased in recent years, as the number of those outside the church (who thus have the potential to make such a decision) has grown. The vast majority of those joining the church do not belong to any other church at the time.67

The Finns’ confidence in the church improved significantly in the 1990s. While 32 percent of the Finns expressed confidence in the church in 1990, no fewer than 57 percent did so in 2000. In part this was due to the fact that the materialistic values lost their importance as a consequence of the recession; another important factor was the way in which the folk church supported the people by helping to solve the problems caused by the recession. The majority of the Finns regard the Church as necessary, honest, competent and reliable. Many negative perceptions lost their edge during the late 1990s. The most important change was that by the end of the 1990s only 35 percent of Finns saw the Church as behind the times, while in the mid-1990s this view had been held by 51 percent. The number of those perceiving the Church as distant also fell, from 37 percent in 1995 to 29 percent in 1999.68 The positive image of the church among Finns has even increased toward the 21st century.69 But, why do so many Finns trust the church? The role of church social work is an essential factor, since more than 90 percent of Finns consider the work of the church with the elderly, the disabled and the young as either important or very important.70 Interestingly, the very latest figures also indicate that Finns are most dissatisfied with church activities with the unemployed,71 which seems to indicate their desire for further church action. Related to the church’s role in maintain societal values of giving, a recent study72 has also pointed out that even

69 Currently, 77 percent Finns view the church positively, which is 8 percent higher than in 1999 (Gallup Ecclesiastica 2003).
70 Salonen et al. 2001. Furthermore, most (82 percent) Finnish church members consider church social work with the elderly and the handicapped an important reason for their church membership (Gallup Ecclesiastica 2003).
71 Those dissatisfied represent 23 percent, and almost as many (18 percent) are displeased with the church’s public ethical statements (Gallup Ecclesiastica 2003). The latter is more difficult to interpret as it is probably divided between those who wish the church was louder and those who wished it was quieter in public, even political debates.
72 Yeung 2003a.
though religious elements are not very important in Finns’ perceptions of voluntary work, the Lutheran church is explicit in these perceptions.

Pietism, with its emphasis on individual conversion and personal spirituality and its appeal to the emotions, got a foothold on the Finnish religious ground at the beginning of the 18th century. From and against this background, the traditional revivalist movements emerged at the beginning of the 19th century. These were Pietism, Evangelism and Laestadianism.73 Today, the revivalist movements are assemblies within the Evangelical Lutheran Church with their own doctrinal emphases. They have a strong foothold in the life of the Finnish church. A sign of their continuing vigour are the summer festivals organised by the various movements. In the summer of 2000 they attracted a total of about 150,000 guests. The summer festival of the conservative Laestadians is the largest annual religious event in Finland. In summer 2001 it brought together 76,000 people.74

The main other religious communities

The main religious communities of the Finnish context are gathered to the following table:

Table 2. Churches and religions in Finland75

<table>
<thead>
<tr>
<th>Religion</th>
<th>Members</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lutherans</td>
<td>4,398,000</td>
<td>85</td>
</tr>
<tr>
<td>Orthodox</td>
<td>57,000</td>
<td>1</td>
</tr>
<tr>
<td>Pentecostals</td>
<td>50,000</td>
<td>1</td>
</tr>
<tr>
<td>Members of Finnish Free Church</td>
<td>13,000</td>
<td></td>
</tr>
<tr>
<td>Roman Catholics</td>
<td>5,000</td>
<td></td>
</tr>
<tr>
<td>Adventists</td>
<td>5,000</td>
<td></td>
</tr>
<tr>
<td>Baptists</td>
<td>2,500</td>
<td></td>
</tr>
<tr>
<td>Methodists</td>
<td>1,300</td>
<td></td>
</tr>
<tr>
<td>Anglicans-Episcopalian</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Members of other Christian churches</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td>Jehovah’s Witnesses</td>
<td>17,000</td>
<td></td>
</tr>
<tr>
<td>Muslims</td>
<td>10,000</td>
<td></td>
</tr>
<tr>
<td>Mormons</td>
<td>4,000</td>
<td></td>
</tr>
<tr>
<td>Jews</td>
<td>1,300</td>
<td></td>
</tr>
<tr>
<td>Non-affiliated</td>
<td>500,000</td>
<td>10</td>
</tr>
</tbody>
</table>

73 Kääriäinen 2002.
75 Evangelical Lutheran church, churches and religions in Finland 2004.
The number of those members of society not belonging to any church has grown in recent decades, as it has throughout Western Europe. It includes, however, members of non-registered religious communities (e.g. Pentecostal congregations). Atheists are still a rarity in modern Finland: only 3 percent of those surveyed in 2000 identified themselves as atheists.\(^7\)

The Orthodox Church of Finland has the same official ‘folk church’ status as the Lutheran Church. Its members are for the most part ethnically Finnish, and hierarchically this church is a part of the Ecumenical Patriarchate of Constantinople. Missionaries brought the Orthodox faith to Finland in the twelfth century from Novgorod, and until the time of Finnish independence in 1917 the Orthodox Church of Finland was a member of the Church of Russia. These days Finland’s largest Orthodox parish is that of Helsinki, but the largest concentrations of Orthodox Church members are in the eastern and northeastern parts of the country. There are also three Russian Orthodox congregations under the Moscow Patriarchate in Finland. The Orthodox Church has three dioceses in Finland. Many of its parishes are extremely wide geographically, and as a result many of their members are unable to participate regularly in worship and other church activities. Children of Orthodox families, however, are able to receive confessional orthodox religious education within the public education system. There are also church organisations, which bring together Orthodox believers from different parts of the country.\(^7\)

The first Muslims came to Finland with the Russian army when the 19th century was nearing its end. The foundations of the traditional community of a thousand or so Muslims were laid by the arrival of Tatar merchants from Russia at the end of the 19th century. The Finnish Islamic congregation was registered in 1925. The majority of the Finnish Muslims live in the Helsinki region. The number of foreign residents in Finland rose dramatically in the early nineties, with a number of refugees arriving from Somalia, as well as Muslim immigrants from other nations. They have established their own mosques and societies. In 1996 these groups came together to form a cooperative organ called The Federation of Islamic Organisations in Finland. Only a small minority of the newcomers have registered as members of the Finnish Islamic congregation. Altogether, the exact number of Muslims in Finland is difficult to estimate, with figures ranging from 10,000 to 40,000.\(^7\) The new religious movements with most followers in Finland are those with Christian roots. Jehovah’s Witnesses are Finland’s fourth largest religious group, following the two “folk churches” and the Pentecostals.\(^7\)

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\(^7\) Kääriäinen 2001. In 2000 the proportion was 12.7 percent.
\(^7\) Membership of the Orthodox Church fell in the 1950s and 1960s as a consequence of the large proportion (close to 90 percent) of marriages between Lutherans and Orthodox. The children of these marriages were usually baptised as Lutherans. The trend changed in the 1980s and membership of the Orthodox Church has begun to grow, with more people joining it than leaving it. It currently has 55,000 members, which is 1.1 percent of the Finnish population. Interest has grown particularly in the Orthodox traditions of Carelia and in the liturgical life of the church. Raitis 2001; Kääriäinen 2002.
\(^7\) Raitis 2001; Kääriäinen 2001.
\(^7\) Raitis 2001.
Other religious organisations in social work

In Finland, Christian organisations have principally been responsible for missionary and evangelical work, but they have also been involved in a certain amount of work with children and young people, counselling and related activities, and publishing. Most of the professional training of church employees is arranged by these organisations. Revivalist movements are an accepted element of the Lutheran Church and the national culture, and the previously negative attitude of these movements towards many areas of culture has mellowed. They are seen as part of the church’s heritage.80

The church of Finland embraces numerous associations, which co-operate with the church, and the church supports their activities in several ways. In 1996 one of ten Finns considered themselves active members of the church or some other religious organisation, which, together with the rate of the sports associations, is the highest among all associations. The church associations undertake many important activities, including missionary work, child and youth work, and publishing. The biggest group of church associations, however, represents social work. All in all, the present-day church associations can be divided into five groups: official missionary organisations, other missionary and evangelical organisations, social work activities, organisations covering youth, education, and culture, and national centres.81

Relationship between the church and state

The most crucial downhill shove given to the old-fashioned state-church structure came in Finland with the Church Act enacted in 1869. In particular the law’s stipulations relating to the Synod and its authority indicated a clear turning point for church-state relations. In terms of self-regulation – in other words, church law – the church took on a decisive and very independent role.

Church law in this respect is endorsed in a unique way, using its own legislative system. Its unique features include the fact that the power to initiate adjustments and changes in church law rests solely with the Church’s own legislative body, the Synod. The Lutheran Church’s autonomy in internal affairs is further protected by the fact that the national Parliament, which must ultimately ratify church law, has no right to revise the content of the proposals it receives from the Synod. It is interesting, however, that following Finland’s independence (1917) and the establishment of a republican form of government (1919), the government’s final authority over the church was not removed. The Constitution Act of 1919 did indeed enshrine the principle of religious freedom, and the Lutheran faith was no longer officially recognised as the state ideology. At the same time, however, the Constitution Act strengthened the church’s powers to independently regulate its own organisational and administrative structure. The question of final authority over the church was left for the Synod to consider as a matter of church law. The

80 Kääriäinen 2002.
old semantic form of the law was still left unchanged in 1944, when the current Church Council system was established, decisively moving authority over many practical matters in the day-to-day running of the church from the Ministry of Education to the church’s own administrative body.\footnote{Seppo 2001.}

There have also been more recent changes in the church-state relations in Finland. In the autumn of 1995 the Synod decided to bring diocesan chapter administration fully under the church’s control. Thus, when this law came into force in the beginning of 1997, chapter workers ceased to be state officials, and the maintenance of the chapters and the employment contracts and payroll expenses for all of the workers in these offices gradually became the responsibility of the church. The state’s indirect financial support for the church can also be seen in the fact that Lutheran chaplains working in the Finnish military and in the prison system are on the state payroll. Until 1997 the state also paid for the church’s personal counselling services for those with impaired hearing. The state’s direct support for the church’s general budget, though, is quite small. In addition to administrative and economic ties, the contacts between church and state are also visible in certain other areas. Some of the clearest manifestations of the old state church system are to be seen in economically insignificant customs: opening ceremonies for state occasions still include a Lutheran worship service.\footnote{Seppo 2001.}

All in all, in the Nordic context, the Finnish church has an outstandingly democratic history, and the Finnish institutional religion changed from state-orientated towards society and civil-society oriented relatively early.\footnote{E.g., in Norway and in Finland the revival movements of 19th century acted partially inside the established church, different from Denmark and Sweden. The separation of church and state began in Finnish legislation already in 1869 and 1922. Kääriäinen et al. 2003, 259–260.} The church of Finland has, by tradition, been branded in two different ways: some speak of it as a state church, while others call it a folk church. According to professor J. Seppo\footnote{Seppo 2001.}, both labels are rather ambiguous and vulnerable to propagandistic use. Used in a critically evaluated way, though, they remain useful in that they still give a rough picture of the position of the church in the Finnish society.

Seppo continues, that in a social sense, there is a folk church situation in Finland in view of the fact that a vast majority of the population are members of the Lutheran Church. Many churchmen would also add that there is still a situation in Finland where the Lutheran Church carries a special responsibility to serve the nation as a whole. In order to comprehend the current religious situation and church politics in Finland, it is essential to consider the country’s strong state-church oriented tradition.\footnote{Seppo 2001.}

However, the new law of religious freedom (2003) has changed the picture. For instance, it has been argued that the government cannot any longer decree days of prayer. Yet new legislation governing burial practices has in fact given the Lutheran Church increased responsibility for burials and cemeteries. At present, the situation...
is rather exciting as the latest legislative changes are so recent and some of their consequences remain to be seen.

The organisational structure of the church

The Evangelical Lutheran Church of Finland is an episcopalian church with a very strong tradition of parish autonomy. During the recent decades the importance of the church’s national bodies has grown significantly. The most significant levels of administration are the parish, the diocese, and the church as a whole. The central principle of administration is that each administrative body includes both clergy and lay people. With the exception of the diocesan chapters and the Bishops’ Conference, all administrative bodies within the church have a clear majority of lay people.87

According to the territorial principle, church members belong to the parish in which area they live. Large parishes are characteristic to Finland’s ecclesiastical situation. Of the ca 570 parishes in the Evangelical Lutheran Church of Finland, only 30 have less than one thousand members. The average parish has 7,000 members, with the smallest parishes comprising only a few hundred members and the largest tens of thousands. The highest decision-making body within each parish is the parish council (parochial council), the members of which (11–39, depending on the size of the parish) are elected every four years in elections, which are held at the same time throughout the country. All members of the parish over the age of 18 have the right to vote in the parish council elections. The parochial council determines the church tax rate of the parish, approves parish budgets, operational plans, and annual reports, decides on building projects, etc. If there are a number of parishes within the same city or municipality, common elections are held to select members for each parish’s own parochial council as well as representatives to a joint parochial council, which in turn appoints members to a joint board. In these cases a parish union is typically established to handle financial matters. The parish union frequently deals with aspects of pastoral care, including portions of diaconal work, youth work, child care and family counselling, and public relations work.88

Normally around ten parishes come together to form a deanery, in which one vicar assists the bishop by acting as an area dean. Very little administrative work is done on the deanery level, but often it functions as a stage for inter-parish cooperation in various fields of church work.89

The Evangelical Lutheran Church of Finland is composed of nine dioceses, eight of which are regional, with the remaining one covering all of the country’s parishes with Swedish speaking majority. A bishop is the head of his (or potentially her) diocese’s administration. The bishop is assisted by the diocesan chapter, which also acts as an independent administrative body. The bishop is the chairperson of the

87 Mäkeläinen 2001a.
88 Kääriäinen 2001; Mäkeläinen 2001a.
89 Mäkeläinen 2001a.
chapter, with the dean acting as vice-chair. The rest of the membership is composed of two clergy assessors, one lay member, the legal assessor and the diocesan dean.

There is, in addition, a new body, the diocesan council. Interestingly, the diocesan administration has recently been reformed (1.5.2004–) by replacing the annual diocesan meeting with a diocesan council, consisting of 14 lay representatives and 7 clergy representatives. A lay representative acts as the chairperson. The diocesan council approves the operational and financial plan of the diocese, prepares a budget proposal for the Central Church Fund, and drafts proposals for deliberation by the Church Council. Pastors are subordinate to the bishop and the diocesan chapter, but their employers and paymasters are still the parishes. Each diocese, in addition to the bishop, also employs a full-time lawyer and at least four experts in personnel training and operational development.90

The supreme decision-making body for the entire church is the Synod, which determines the doctrines, policies and finances of the church. The synod meets twice a year.91 Prior to 1974 the Synod gathered only once every five years, but then a major administrative reform happened. Currently the Synod gathers twice a year. The Synod has the tasks of approving the church’s confessional and liturgical books, and deciding on changes in the church act, the church order, and church election systems. The Synod also decides on matters of official relationships with other church organisations and confessional groups and inter-church organisations, evaluates doctrinal statements, and gives expert advice to the Council of State, as well as approving the church budget and evaluating the operational strategies and annual reports prepared by the Church Council offices.92

The church’s common organ for general administrative functions is the Church Council. Its duty is to take care of the church’s common administrative, economic and strategic needs. The Church Council normally meets monthly. The Archbishop serves as chairperson, and other members include two bishops, two pastors and eight laypersons. In the offices of the Church Council there is a total of approximately 200 full-time employees. In addition to this, Finnchurchaid, the church’s charity organisation, operates as a separate foundation, employing approximately 30 workers. The Bishops’ Conference handles issues relating to the faith, proclamations, and work of the church, as well as those relating to diocesan administration and care. One special Finnish feature is that in addition to the bishops and the military field bishop, one assessor from each diocese is also present at these meetings.93

Financial situation of the church

Based on its public rights in state legislation, the church is entitled to collect taxes. In addition to church members, societies and corporations are also required to pay

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91 Kääriäinen 2002.
92 Mäkeläinen 2001a.
93 Mäkeläinen 2001a.
church taxes, with the exception of registered religious organisations and free-thinker societies. From the perspective of the church’s overall economic structure, the right to collect taxes is quite important. In its own way this reflects not only the relationship between church and state, but also the social significance of the church.\textsuperscript{94} The parishes obtain 78 percent of their income in the form of a church tax charged along with state and local taxation. Mainly individual parishioners pay the tax. In addition, the Lutheran church (like the Orthodox church) receives a share of the corporate tax. In 2000, the parishes’ income from taxes totalled 723 million euros.\textsuperscript{95} The way the church tax is used is illustrated in the following table:\textsuperscript{96}

**Table 3. The usage of the church tax**

<table>
<thead>
<tr>
<th>Usage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>parish work</td>
<td>44%</td>
</tr>
<tr>
<td>maintenance of churches and other buildings</td>
<td>17%</td>
</tr>
<tr>
<td>pensions, tax collection, general needs of the church</td>
<td>12%</td>
</tr>
<tr>
<td>construction</td>
<td>10%</td>
</tr>
<tr>
<td>administration</td>
<td>9%</td>
</tr>
<tr>
<td>maintenance of cemeteries</td>
<td>6%</td>
</tr>
<tr>
<td>missionary work and development aid</td>
<td>2%</td>
</tr>
</tbody>
</table>

The diverse activities of the Lutheran Church are reflected in the structure of its personnel. It is doubtful that in many churches in the world parochial priests would represent only one in ten of Church employees, as in Finland. In 2000, the church had 19,600 (full or part time) employees.\textsuperscript{97} The number of parishioners per pastor is exceedingly large in Finland; there are approximately 2,300 parishioners for every pastor. According to church staff statistics, there are over 900 different job titles within the church. The table below shows the number of church employees grouped by job type.\textsuperscript{98}

The table also shows the gender structure of the church employees. After a long discussion the ordination of women was approved in Finland in 1986, and the first women were ordained in 1987. Prior to this female theologians could work in parishes only as lectors, conducting general church work and preaching, but not performing church rites. Today one quarter of the church’s pastors are women. In terms of work directed towards the parishioners themselves, the largest group of church employees is in children’s work. Their number has increased exponentially in the past few decades. Most of them are directors of day-club activities for 4–6-year-olds, work-

\textsuperscript{94} Laws concerning church finance are generally passed as general parliamentary legislation, although church law also contains some regulations concerning church taxes. Thus, in the final analysis, it is parliament rather than the synod that determines, both indirectly and directly, the content of many laws relating to the church’s economic structure. Seppo 2001.

\textsuperscript{95} Kääriäinen 2002.

\textsuperscript{96} The average amount raised as taxes is about US$ 145 per member a year. Evangelical Lutheran Church, finances 2004.

\textsuperscript{97} Kääriäinen 2002; Salonen et al., 2001. In 1997 the church employed over 19,500 people, and 80 percent of these were full-time and only 5 percent had the church as their second employer. Converted into work years the total input was 14,100 employee work years. This figure is somewhat lower than at the beginning of the nineties owing to the pressures of Finland’s economic recession, but since the middle of the decade there has been a steady increase. Mäkeläinen 2001b.

\textsuperscript{98} Because not all employees are full-time or year-round, the chart also includes figures in employee work years for easier comparison. Mäkeläinen 2001b.
ing only part-time, and not working during the summer holidays; but the number of employee work years in this field is still as high as 1,700 each year.\footnote{Mäkeläinen 2001b.}

Table 4. The church employees

<table>
<thead>
<tr>
<th>Job type</th>
<th>Number of workers</th>
<th>% of women</th>
<th>Employee work years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parish pastors</td>
<td>1,884</td>
<td>26</td>
<td>1,844</td>
</tr>
<tr>
<td>Lectors</td>
<td>34</td>
<td>100</td>
<td>33</td>
</tr>
<tr>
<td>Hospital chaplains</td>
<td>130</td>
<td>53</td>
<td>108</td>
</tr>
<tr>
<td>Family councilors</td>
<td>131</td>
<td>63</td>
<td>121</td>
</tr>
<tr>
<td>Church musicians</td>
<td>838</td>
<td>46</td>
<td>780</td>
</tr>
<tr>
<td>Diaconal Workers</td>
<td>1,247</td>
<td>90</td>
<td>1,192</td>
</tr>
<tr>
<td>Youth Workers</td>
<td>1,274</td>
<td>59</td>
<td>1,078</td>
</tr>
<tr>
<td>Children’s workers</td>
<td>2,511</td>
<td>99</td>
<td>1,823</td>
</tr>
<tr>
<td>Other pastoral work</td>
<td>467</td>
<td>69</td>
<td>177</td>
</tr>
<tr>
<td>Pastoral work total</td>
<td>8,516</td>
<td>68</td>
<td>7,155</td>
</tr>
<tr>
<td>Membership records, admin. &amp; office work</td>
<td>2,437</td>
<td>87</td>
<td>2,191</td>
</tr>
<tr>
<td>Cemetery maintenance</td>
<td>4,329</td>
<td>66</td>
<td>1,633</td>
</tr>
<tr>
<td>Other parish facility related work</td>
<td>3,929</td>
<td>70</td>
<td>2,915</td>
</tr>
<tr>
<td>Other</td>
<td>368</td>
<td>33</td>
<td>257</td>
</tr>
<tr>
<td>TOTAL</td>
<td>19,579</td>
<td>69</td>
<td>14,151</td>
</tr>
</tbody>
</table>

Altogether, it was the strong conservative voices inside the Finnish church and its revival movements that caused the late resolution to ordinate also women as priests. Still today the critical voices and debates rise from time to time, and there sometimes is reluctance by some male priests to co-operate with women priests. Such occasions are then reported also in church and other media.

With reference to paid workers, a parish is required to have at least a cantor and one diaconal worker in addition to the office of the pastor. Especially during the post-war years the role of diaconal work has developed. This has been followed by the rise of church youth work, and since the sixties day-clubs, and with them other forms of children’s work, have grown into a major occupational area. At the same time many specialised areas of church work, such as hospital chaplaincy and family counselling, have been reinforced. The role of the Finnish church social work is different from its counterparts in most churches. For instance, in addition to their studies related to the social work studies, they go through a specifically church-oriented training. In practice, the day-to-day routines of a deaconess involve very little traditional health-care work. The primary focus of the work is helping those who are in some way disadvantaged. Previously this meant working primarily with the elderly, but as the social situation has changed, the work is increasingly oriented...
towards working age people. These days there is extensive cooperation between the church and the municipal social service offices.  

**The role of volunteer work**

A significant feature of the Finnish Lutheran church is the large number of paid employees, as noted above, but also volunteer work plays a multifaceted role in the church context. Traditionally volunteers have acted as group leaders in children’s and youth work, and, for example, in mission circles. There are currently some 31,000 volunteers active in church work with children (including parish scout troop organisers), and nearly 8,000 in adult work.  

100 I define volunteering (and volunteerism as its synonym) in this study as a helping action by an individual that is conducted out of free will and without pay in an organisational context.

Even though the Finnish welfare state had been in favour and relatively stable through the 1980s, 102 the non-profit sector and voluntary work had continued to develop bit by bit, both in church and other contexts. However, the real challenge took place with the recession of the early 1990s. After the recession voluntary work was welcomed in nearly all areas of life, also in a church context. 103 During the recession, the number of church volunteers increased by one third, and between 1992 and 1995 the number of support personnel rose by a fifth. Additionally, new forms of voluntary work were established. One example is the “Gran’s corners,” initiated in 1989, which spread widely in diverse forms during the 1990s. They serve as informal meeting points for people and as agencies for volunteers. By the mid 1990s, they already had approximately a thousand participants, and in 1997 there were almost 700 volunteer centres following their example, organised both by congregations and civic organisations. 104 The active role of church social work became very visible, both church social work and church volunteerism being widely discussed in church and other media.  

The voluntary activities of the church seem generally to interest people: the church had over 150,000 volunteers in 1995. The most popular activities were teaching Sunday school, youth work, church social work, and activities for the unemployed. 106 According to a poll taken in 1996, two out of three church members over 15 years old would be interested in volunteering if asked to. The results also

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100 Training for the posts in church social and youth work is now provided at polytechnics, particularly at the Diaconia Institute of Higher Education owned by church organisations, which provides its students with qualifications that are also valid for posts with a similar profile outside the church. Mäkeläinen 2001b.

101 Mäkeläinen 2001b.


103 Matthies 1996.

104 Heinä et al. 1997, 89; Salonen et al. 2000. It must also be noted that the new church law came into effect in 1994, the aftermath of the recession. It included an innovative, explicit expression concerning love of one’s neighbor, which extended the welfare view. However, this change was not very visible in the media and, in my view, does not explain the rising volunteerism in church social work.

106 For examples of articles, see Yeung 1999.

revealed that most respondents, particularly men, are more interested in practical activities such as cleaning and renovating, and much less in planning services or Bible studies, for instance. Thus, church council documents have shown that church voluntarism should be understood more broadly and inclusively.107

The Finnish set of values reflects elements of both for and against voluntarism and civic activities. The rise in communal values, still maintained in the early 1990s, stopped towards the latter part of the decade. Since then the values have turned in a more individualised direction, with the values of functionality and action, creativity as well as new ideas, matters and innovations rising.108 It has been asked what the ideological and moral basis of voluntarism in late-modernity is.109 The fact that the Lutheran church does not explicitly demand good deeds from its members has been thought not to create a solid basis for volunteer work.110 However, the traditional values have not been abandoned in Finland, and the demands for social justice and high social morality, as well as political frustration, have strengthened in the late 1990s.111

At present, volunteer activities affect all church activities, and their role in church social work is significant. By Nordic comparison112 this is a unique feature, underlining the interest of a Finnish case study. The situation, however, varies from one congregation to another, especially as the finances of congregations grow unequally; the role of church voluntarism also ranges from extra activities to maintaining core activities. The interest in church social work voluntarism has continued to increase between 1996 and 1999 (by 13.2 percent).113 This popularity is also indicated in the table below.

According to the church documents, the aim is to construct a lively church, in which paid-workers and members interact in creative, equal co-operation.114 However, when we put the figures for church voluntarism in the larger perspective, research indicates that Finns partake in volunteerism actively, but that religious activities is the main field of volunteerism only for every sixth volunteer.115 By

107 Heino et al. 1997, 87–89.
109 Lähteenmaa 1997, 164.
110 Anttonen & Sipilä 1992, 448.
112 E.g., in Sweden, most volunteers of the established church participate particularly on boards, committees, and in fundraising. Jeppson Grassman 2003, 9.
113 Salonen et al. 2000, 112, 320. In 1999, there were altogether 36,000 volunteers. What is interesting in the changes in 1996–1999 is that the numbers of volunteers had great variety; for example, participation strongly increased in the urban congregations of the Oulu (+54.5 percent) and Turku (+28.0 percent) dioceses, as the rural congregations of the Oulu (+53.6 percent), Porvoo (+108.8 percent), and Tampere (+31.1 percent) dioceses. However, interest evidently decreased in urban parts of the Tampere diocese (-11.3 percent) and in rural parts of Helsinki (-19.6 percent). Beside church social work, other volunteer activities of great interest in 2001 include “Joint Responsibility” fund-raising (app. 40,000 volunteers), elected officials (app. 30,000), and participants in church choirs (app. 37,000). Annual statistics book of the church 2001.
114 Seurakuntalisten kirkko 1997, 19.
115 Yeung 2002, 2003a. Every third Finn currently volunteers. The most popular fields include sport, social work, and education. The figure for participation in religious organisations could also be interpreted to mean that church volunteers might often volunteer in other contexts as well and for some reason consider these activities as their main area of volunteerism.
Nordic comparison this is still very high. Also social work volunteerism and the overall share of welfare and health care held by the voluntary sector is larger in Finland than in its Western neighbours.\textsuperscript{116}

Table 5. Church volunteers in 2000 and 2002\textsuperscript{117}

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday school teachers</td>
<td>7,771</td>
<td>6,987</td>
</tr>
<tr>
<td>Sub-teen club teachers</td>
<td>9,549</td>
<td>9,292</td>
</tr>
<tr>
<td>Youth group guides</td>
<td>1,482</td>
<td>1,166</td>
</tr>
<tr>
<td>Confirmation school volunteers</td>
<td>13,006</td>
<td>13,212</td>
</tr>
<tr>
<td>Scout group leaders</td>
<td>8,355</td>
<td>8,563</td>
</tr>
<tr>
<td>Volunteers in social work</td>
<td>26,678</td>
<td>27,561</td>
</tr>
<tr>
<td>Advisors in social work groups</td>
<td>2,726</td>
<td>2,624</td>
</tr>
<tr>
<td>“Serving telephone” volunteers</td>
<td>1,590</td>
<td>1,475</td>
</tr>
</tbody>
</table>

The historic influence of the church

The historic roots of the role of the church in the Finnish welfare system date back for centuries. The Reformation changed social thinking with its teaching of the two realms of society. The relief for the poor was moved from the church to the entire community. Still, the realms were not understood as two, completely separate entities but as dimensions of the same joint responsibility, both with their own tasks. Sweden and Finland created legislation that the church was to support the state in poor relief.\textsuperscript{118} In the 17\textsuperscript{th} and 18\textsuperscript{th} centuries, the state attempted to define its responsibilities concerning social work by passing legislation. In the process, congregations were ordered to carry further responsibilities for caring for the poor. However, it was only in the later half of the 18\textsuperscript{th} century that the Lutheran church of Finland was actually strong enough to fulfil these social responsibilities. The need for the poor relief was great in the agricultural, undeveloped society. The congregations gave assistance from their poor-relief funds and the pastors encouraged citizens to offer mutual help. It was this assistance from close social circles that carried the main responsibility for poor relief, even until the mid nineteenth century.\textsuperscript{119}

The state and the church were strongly intertwined, even inseparable, all through the 17\textsuperscript{th}, 18\textsuperscript{th} and early the 19\textsuperscript{th} century. For example, in 1788, poor relief became a communal responsibility (that is, responsibility of local council), but the vicars chaired the community meetings. Similarly, the poor-relief statute of 1852 ordered regulations separate from the church, but vicars were demanded to chair the poor-relief boards.\textsuperscript{120} This centrality of the church illustrates the fundamental role of the


\textsuperscript{118} Malkavaara 2000, 18–19.

\textsuperscript{119} Karisto & Takala & Haapola 1999, 227; Pulma 1994, 32–35.

\textsuperscript{120} Heininen & Heikkilä 1996, 180; Karisto & Takala & Haapola 1999, 232.
church in the Finnish agricultural society of the pre-modern times. In 1809, as a result of a war, Finland was moved from being a Swedish dependency to a Grand Duchy under the Russian czar. However, the Lutheran state church and constitutional law remained. Nevertheless, the 19th century was a period of great societal transition in Finland. The changes brought about capitalism, industrialisation, urbanisation, intensive population increase and massive changes in agriculture and ways of life. These developments were strongly influenced by new trade politics and the economic growth of foreign countries. Since the 1850s, the societal changes carried with them liberal views. As a result, there were vivid discussions on reforms concerning trade politics, industrialisation, language politics, education, and freedom of religions. Yet it was difficult for the conservative church to adapt to the changing society. The need for its care of the poor had risen. At the same time, citizens criticised the responsibilities of poor relief for various reasons: liberalism emphasised individualism, and revival movements criticised social work based on theological grounds. Following Luther’s view concerning the separate roles of the church and the state, they viewed the church was primarily as an institution for spiritual matters of gospel. Actually, overall, as a consequence of the two-kingdom doctrine, the Finnish Lutheran church has not been traditionally very in discussing societal issues.

In the late 19th century, several important reforms took place in the poor relief. The municipal administration separated from the congregations in 1865. Moreover, with the church law of 1869 and the liberal-spirited statute from 1879, responsibility for social assistance was moved from the congregations to the municipalities. As the church was freed from these social tasks and responsibilities, it also lost some of its public role in Finnish society. This process clearly reflects modernisation and two subtheses of secularisation: the differentiation of the sectors of society, as well as the marginalisation of religion to a more privatised sphere of life.

The societal transition of the 19th century resulted in cultural changes within Finnish society. One of them was the rise of activism by citizens, which was evident in revival movements, youth and church associations, and movements for temperance, popular education and working-class ideology. During the period from the late 19th century to the First World War, the focus of social policy was shifted from poor relief to the issues of the working-class. There were lively debates on several reforms, but the developments were delayed due to the slowness of industrialisation in Finland. The rise of citizen activity also took place in the church. As the official responsibilities of social work had been moved from the church to the municipalities, there was room for voluntary helping. This was also illustrated in the birth of the church associations and deaconesses’ institutions.

The church associations found their social work niche in those areas in which the

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122 Hytönen 2003b, 72.
125 Heininen & Heikkilä 1996, 196, 210; Kansanaho & Hissa 1979, 50, 53.
public sector did not reach. These associations emphasised action at the grass-roots level, and created new forms of activities. The significance of the social work of these associations grew during the 1880s and the 1890s. Industrialisation and urbanisation had started fully to progress, resulting in many new social problems being created specifically in the urban areas.126

There were grounds for the church to support the church associations; since beginning in the 1880s, criticism against the church had increased and some citizens had started to re-evaluate the status of the state church. As a reaction, the role of the church as a national church was emphasised. This gradually included supporting the activities of the church associations. For the church, these associations represented a good counterbalance against the secularised spirit.127 Additionally, the Protestant nonconformist movements, e.g. Salvation Army, had posed a challenge to the church with their active social work.128 As the municipalities preferred to assist the work of private associations, the church similarly supported the associations instead of widening its own social work.129 All in all, the benefits were mutual: the closer relationship between the church and the church associations helped the church to align with social changes, and thereby strengthened the status of the associations.

With their active social work, the church associations served as models to the church. Starting from the late 19th century, there were lively discussions in the church on whether to widen the diaconal tasks. The social work of the municipalities was insufficient in the changing society. The church was divided into two diaconal models. Using the model of the Kuopio diocese, a unique Finnish way of congregational diaconia was established. In 1913, as the Church Assembly included promoting diaconia as an essential part of vicars’ duties, it was interpreted in the church that diaconia was now considered to be an official activity of the whole church. With church social work, the church wanted to complement the social security offered by the municipalities, not to compete with it.130 All in all, as the traditional integrated culture of Finnish society was challenged by the 19th century transition, it brought pressure to marginalise of the role of the church. However, as the church associations had flexibly kept up with societal changes, an internal dynamic emerged within the church. It was this activism that the church supported, and as a result, the church consolidated its status in the changing society.

Finnish civil society continued to maintain social welfare after independence in 1917. In the aftermath of the civil war in 1918 there was a great demand for the church to promote national integrity. This “national Christianity” emphasised traditions of revival movements, nationalism, and right-wing political thinking.131 The church encroached on most of the activities initiated by the church associations, especially in social work, the home mission, missionary work, and Sunday schools,132 and paid

employees started to cover these fields. This reflects a more general growth in professionalism. Between 1918 and 1936, the number of paid non-church social workers doubled and the number of volunteers decreased by half. Bureaucratic and efficient work became the ideal of social work.133

The Second World War strengthened the ethos and the need for the church to emphasise its nature as a national church. During the war, the pastors came closer to different stratum of the population. Inside the church, the ideal became to serve and to integrate citizens, and to give an identity to the nation. Consequently, the Church Assembly recorded an obligatory post of diaconia into the church law in 1944. Social work of the church thus increased rapidly and developed several new forms of social activity, such as family counselling and children’s clubs.134 Wartime also emphasised the need for social work in the public sector. Specifically, it emphasised the central role of the state. After the war, social policy moved from the residual model to a state-centred, institutional model. In the beginning, the grounds for the development were political and ethical, but later were also economic. This process meant a transition to a welfare state.135

The institutional model of social policy resulted in a rise of the professionalism in the public sector. Diaconia reflected this process of development in modern paid-work. In both contexts, social work was drifting away from the civil society into an isolated niche of its own. Being bureaucratic, efficient and hierarchical became ideals both in the public sector and diaconia. As a result, the amounts of the paid-workers rose in both contexts.136 As the role of the public social work increased, it became necessary for the diaconia to clarify its niche. Certain unique features were emphasised: individual and immediate helping, spiritual and mental assistance, as well as an ethos of sacrifice and voluntarism.137

The new law on public health (1972) drastically diminished the role of church social work. The political ethos favoured a powerful state. The church had to legitimise its social work in a new way: it changed emphasis, stressing pastoral care. As the church started to emphasise the role of its members in social work, the change applied first to recreation, counselling, and activities with children, youth and the elderly. The concept of the “social work of congregations” was to be replaced by the notion of the “social work congregation.” It was still considered necessary that a professional paid worker organise the voluntary work, and the selection and education of the volunteers were emphasised.138 The following decade, the 1980s, was when the process of individualisation reached individual ways of living.139 One arena, which continued to be strengthened, was church volunteerism,

137 Kansanaho & Hissa 1979: 97.
which was more discussed in the church media. The congregations still favoured professionalism, and volunteerism consequently became rather a specialised, fragmented field of its own in several congregations.

The severe economic depression of the early 1990s caused criticism of social policy, and budget cuts were begun. At the same time, the need for social services grew because of rapidly increasing unemployment. The church was a more prominent element of this discussion; the recession caused great demand for their social work, and municipalities also sought co-operation from local parishes. The church quickly reacted to these problems. Its activities became exceptionally diverse, including pioneering debt counselling, provision of meals, supporting mental health patients, and organising meeting places and activities for the unemployed. The economic difficulties increased the number of working age people and families seeking help from the parishes. Church council documents made mention of these activities: "the church, traditionally sluggish and slow to act, has responded surprisingly promptly to the new situation and its demands."

The rising social role of the church was not only active but also visible. Employees in Christian social work organised demonstrations against the reductions in social security. Pastors and bishops participated actively in debates on poverty, challenging the public sector. The extension in church welfare was widely reported by the media, and the active role played by the church during the recession gave it a more positive public image. The social workers of the church have remained active participants in public debates since the recession on a variety of social, environmental and human rights issues.

During the late 1990s, the Finnish church, and particularly its social work, built closer networks with municipalities and associations in such things as schooling and activities for the elderly. It is natural for a folk church to act in cooperation with municipalities and national organisations, since the vast majority of those in the municipalities and organisations are in fact church members. Such cooperation increased in the 1990s, when the economic recession challenged the Finnish welfare state and when most organisations were faced with economic constraints and enforced reductions in levels of paid staff. Today nearly all parishes regularly cooperate with local authorities when it comes to work with elementary and secondary schools, care for the elderly, children’s day-care, and work with young people and the disabled. If we take random project work into the consideration, nine out of ten parishes work together with local communities in these areas. There is also regular cooperation through frequent sharing of operational facilities. The church also
frequently collaborates with the public authorities in its work among criminals, alcoholics, and drug addicts. Prison chaplains offer inmates the opportunity for discussion and counselling, as well as holding prayer meetings and services. Parish workers collaborate with the prison chaplains and the secular authorities to help newly released prisoners to adapt to their new situation. Help is also provided for those suffering from alcoholism or drug addiction, and in this area, too, there is active cooperation with the secular authorities. All in all, however, even closer networking and co-operation has been hoped for. This is an interesting, broader question; networking and the active role of the Finnish church as a welfare producer reflects major societal changes, particularly welfare pluralism.

The volume of diaconal aid increased steadily throughout the 1990s, and the level of 900,000 counselling sessions per year was reached at the turn of the millennium. In 2000 the number of paid diaconal employees was 1,247. Approximately 7 percent of the population received help and counselling from parish diaconal workers. The main motives for seeking help were unemployment, financial worries, mental health problems, intoxicants, anxiety, and insecurity. Today, parish diaconal activity also includes work with the disabled. The parishes have continued to arrange meals and other activities for the unemployed, often collaborating with unemployed people’s organisations. A total of 440,000 people participated in such meals in 2000. Furthermore, the first food bank was founded at the end of 1995. Since then sixty-five food banks have begun operating all around Finland. The food banks aided 230,000 people in 2000. In some municipalities up to 5 percent of the population used this service. The food banks distributed EU food parcels, supplemented with food bought by the parishes and/or donated by the food industry. Today, the parishes arrange various kinds of support activities for the unemployed, including camps, excursions, and meal services. Many parishes also offer their premises for the use of unemployed people’s associations and organise meeting places or cafés for the unemployed. The most common form of assistance is, however, individual counselling. The church recently also organised, along with the unemployed, a human rights day for unemployed people with the intent of drawing the attention of political decision-makers to the difficulties and the rights of the unemployed.

Theological position concerning welfare

Through its history, the Church of Finland has had its say on ethical and societal issues. During the 1940s and 1950s the church was mainly concerned over moral and social work related issues. After that the questions relating to education were...
often in focus. In the 1970s the statements had specifically to do with both the general political orientation of the church and its social activities.151

As stated above, the Lutheran Church of Finland, all in all, has a great variety of activities and a large number of paid staff, and the number of paid staff doubled in the seventies and eighties. This development has predominantly been seen as positive, but it has raised the question of whether the Church’s operations match up to society’s shifting needs. Is the Church adequately prepared for the future? What sort of path should church operations take? Questions of this nature were raised in the Bishops’ Conference in 1985, which marked the start of a long process of planning and renewal, which consequently continued on the local level. The project reports were entitled Church 2000 (1986), Parish 2000 (1988), and Church Direction 2000: Church Growth from Below (1992). Subsequently, the Church Council has appointed a working group to reflect on the challenges to the work of the church caused by long-term changes in society. The three basic objectives for the development of parish life in the nineties, which the Church 2000 process suggested, were as follows:

- Supporting spiritual renewal
- Realising a responsible lifestyle
- Developing parish structures.152

Bishop Jorma Laulaja’s Elämän oikea ja väärrä (Right and Wrong in Life), first published in 1994, also represents the above mentioned processes. The church initiated its publication, and it speaks out about, for instance, family ethics, environmental issues, immigration, and medicine.153 Furthermore, the Finnish bishops have published a small number of official statements together, such as sexual ethical Kasvamaan yhdessä (Growing together) and Kohti yhteistä hyvää (Toward Common Good), both in 1999. The latter concerns social ethics and verbalises the bishops’ concern over a need for community-based responsibility.154

Concerning church social work, according to church law, the purpose of the church’s social work is to help those who are most in need and who are not helped by others.155 Who are those “most in need” today? The church council documents state, for instance, that those who are especially in need of care include:

- children and young people, who are confronted by a world of too many enticements without dependable guidance, and are seeking their own path without being able to feel confident about the future
- those living under stress and in personal crises
- sick and elderly people who are lonely and forgotten

152 Mäkeläinen 2001c.
153 However, it is hard to interpret to what extent does the document represent the official standpoint of the church. Hytönen 2003a, 16–17.
154 Hytönen 2003a, 18.
155 Kirkkojärjestys 4.3§.
• the poor, the heavily indebted, and others suffering through social exclusion in Finland and abroad.156

The Church Council of the Lutheran Church appointed a working party to consider what kind of positions church functions might have within each of Finland’s future alternatives. Its report was released at the beginning of 1998 with the title “Look to the Future – Guidelines for the Church in Finland.” The working group pointed out the following areas of challenge in particular:
• the future of working communities
• the puzzle of communal responsibility
• civil society
• media and virtual reality
• towards a world village
• the ecological heritage
• the significance of individual life.157

All in all, during the 1990s the church has been quite active in its societal and ethical statements. The church has, for example, regularly offered statements on the initiatives of the Ministry of Social Affairs and Health.158 The church’s social ethics in Finland are, by and large, based on Luther’s two-kingdom doctrine and the Biblical teaching on loving others as one loves oneself.159 Still some would argue, especially because of the first mentioned principle, that the Finnish church has traditionally not been very active in its societal statements.160

The very latest official church strategy is titled Läsnäolon kirkko, “Church of Presence”. It includes the mission, vision and strategy of the church until 2010. It aims to answer the challenges brought on by cultural and population structure changes.161 The document in general emphasises encounter, communication, and cooperation of the church with people and other institutions.

In the last few decades the Evangelical-Lutheran Church of Finland has started to show much greater awareness of its international responsibilities. This is reflected in increased support for both missionary work and development aid and in a greater interest in ecumenical work. Support for missionary work has doubled since the early 1980s, and the proceeds of church collections for foreign aid have increased many times over. The church today has a wide network of international contacts. The most far-reaching connections are those that have been built with inter-church organisations, primarily with the Lutheran World Federation and the World Council of Churches. Links with individual churches are strongest with the Lutheran churches of the Nordic countries and with the Estonian and Ingrian

156 Mäkeläinen 2001c.
157 Mäkeläinen 2001c.
159 Kantanen 1994, 39. She bases her view in this church council publication on bishop Juha Pihkalas views.
Lutheran Churches, as well as with the Anglican church of Great Britain and the Russian Orthodox Church. In 2000, the missionary organisations of the Lutheran Church were working in a total of 33 countries. They had over 500 missionaries, most of them working in Asia and Africa. The income of Finnchurchaid, a church organisation specialising in international social work, in 2001 was 16.31 million euros; biggest shares coming from parish budgetary support, the Finnish government, and fundraising campaigns.162

Situation and policies regarding gender

Overview of the gender situation

Plantenga describes: “Welfare states are not just a collection of laws and institutions, but are based on and contribute to norms and values of women’s (and men’s) proper roles.”163 She describes the social democratic welfare state regime, among others, as a promoter of equality.164 Finland is a good example of such a state.

Finland was the European forerunner in gender equality in 1906: the Finnish women were the first in Europe to receive universal and equal franchise, and the first women in the world to become eligible for parliamentary elections.165 The status of political autonomy within the Russian Empire had, in part, started to fuel a nationalist movement, which, in the early days, was directed less against Russia and more against the old mother country, Sweden with its cultural, economic and political traditions. These facts say something essential not only about the country’s overall cultural mould, but also about how relations between the sexes were constituted in the field of conflicting pressures between a strong nationalist tendency, traditional agrarianism, and the democratisation of social life. No real place was left over for women’s issues as such, yet women were very clearly present in all reform-oriented activity. With the notable exception of the upper social classes, women did not really see their social and political rights to be at odds with the rights of men of their own class. On the contrary, they considered themselves to be for the most part on an equal footing, seeing men as comrades and allies in the struggle to win a better life for all socially, politically and judicially downtrodden people.166

Today the Finnish women participate in working life nearly as frequently as men. Marriage in Finland is associated with an increase in paid work for Finnish men while it is not associated with reduced labour force participation for women.167 In 1996 the share of women of the entire Finnish labour force was 48.6 percent, and

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163 Plantenga 1997, 97.
165 Sulkanen 2004; Manninen 1999.
167 Bryson et al. 1994, 123.
they constituted a half of all employees. While both women and men work full-time, women are in fixed-term employment relationships (19.7 percent) and work part-time (10 percent) more frequently than men (13.8 percent and 4 percent respectively). The majority of both men and women work for the private sector but, however, nearly half of all women are employed by a municipality or the state. The trend from the mid-1990s has been that a growing number of women work for the public service sector, while the share of women in the industrial workforce is decreasing. There has been a fall in the number of women employed in male-dominated fields, although men go for female-dominated occupations slightly more frequently than before. The share of both women and men has grown a little in fields where the proportion of women varies from 40 percent to 59 percent. Nonetheless most men and women continue to work in occupations where their own gender is prevailing. The measures taken by the Ministry of Labour to reduce gender segregation include vocational counselling and adult education provided as part of employment policies. Projects aimed at developing working life should be directed in the same proportion to female- and male-dominated fields. The Ministry of Labour grants aid to development projects according to their impact on gender equality. Finnish women spend more time than men in voluntary or unpaid work. Pay differences between women and men have increased in the past years. In 1994 women's annual earnings for full-time work were on average 74.7 percent of men's corresponding earnings (the figure in 1992 was 76.8 percent). In contrast a comparison of average monthly earnings shows a slight reduction in pay differentials. Finnish women still have a smaller role than men in decision-making for the society. The share of women Members of Parliament has remained at one third for a long time; the figure is slightly lower in municipal councils. Before 1997 only 17 percent of the members of central councils and federal governments in provinces were women. It is even harder for women to reach the top in business life. In 1993 one third of Finland’s biggest companies had no women managers, and women accounted for only 11 percent of all the managers in these companies. In the private sector as a whole, the percentage of women managers was 21 percent in 1990. The only area where women managers are the majority is human resources. Lately, the quota provision in the Equality Act (since 1995) has increased women’s participation in state administration’s decision making.

Unemployment has not affected female and male employees in the same way. In the wake of the recession, men’s unemployment in particular started to grow at an accelerating pace. The difference between women’s and men’s unemployment rates was the greatest in 1992, i.e., 15 percent against 10 percent. The gap has narrowed since then. At the height of the recession in 1994, 19.9 percent of men and 16.7 percent of women were without work. In 1997 approximately the same amount of

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169 In 1987 the figures for unpaid work were: 25.78 hours per week for women, 15.17 for men. Jallinoja 1989. As Forsberg et al. (2000, 43) state, even Scandinavian women take part both in politics and labour market, women retain major responsibility for the household work.

women and men were unemployed. All in all, women’s unemployment grew faster than men’s during the 1990s.

There is no feminisation of poverty in the international sense of the word in Finland: the risk of poverty as a result of a lack of income is the same for women and men in Finland. Women’s status both in the labour market and at home has been strengthened by the Finnish social security system and the possibility of reconciling family life with waged work. Social services and family-policy income transfers have improved the situation of single mothers in particular, a group of women who otherwise would be at risk of being left out of the mainstream society. Evidence indicates that certain groups of men are on average more prone than other people to becoming marginalised and dependent on the safety net provided by the welfare state. However, now more so than earlier, the lifestyle of certain women puts them too at a greater risk of falling into poverty.

The equality programme of the Finnish government (1997) states that, excluding working life, all forms of “small-scale democracy” belong to women’s sphere of activities. In recent years municipalities have overlooked issues relating to participation opportunities; when discussing democracy, the emphasis has been on developing representative democracy. Nevertheless, the programme states that small-scale democracy and large-scale democracy are complementary. Citizenship should be looked at from different aspects when striving towards gender equality. Participation opportunities must be the same for the different residential areas and population groups of a municipality, as well as for women and men.

All in all, what gives an explanation for the convergence of gender pattern in the Finnish labour force? The quick transition to an industrialised service society is one important factor; women have, for a long time, been involved in work and economy. Furthermore, Finland has well developed family and maternity policies and childcare system. The Finnish social policy does not encourage women into part-time employment, as other Scandinavian social democratic welfare states do.

Legal regulations promoting gender equality

The fundamental principles of the Constitution Act have remained untouched for decades, although the Constitution has been adapted to meet the changing needs of the day. The flexibility of the Finnish Constitution is due to the use of exceptive laws, a distinctive feature of the Finnish legal system. In the Finnish context, this means legislation enacted according to the order prescribed for the enactment of

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173 The document defines “small-scale democracy” as people's direct possibility of influencing decisions concerning their own environment, e.g. parents’ position with respect to schools and day-care centres, that of students with respect to educational establishments, that of patients and their relatives with respect to institutions and, naturally, that of occupants and residents with respect to their dwelling or residential area. Small-scale democracy in working life refers to the forms of action at individual working places.
175 Bryson et al. 1994, 124.
constitutional legislation, which without altering the Constitution enacts a material exception to its provisions. This procedure has been employed often in Finland. It has been particularly significant in the area of fundamental rights, and has been progressively used more in recent decades for, e.g., treaties on the European Economic Area and accession to the European Union.176

The history of the Finnish social legislation displays some tension and conflicts in the status of women. The legislation strives on the one hand to promote motherhood, but on the other to support women working outside the home. Attempts have moreover been made to combine these two aims. Under current legislation, every employee is entitled to nine months of maternity leave. Part of the maternity leave is covered by salary, part by a daily allowance. Part of the maternity leave can also be replaced by paternity leave. By law, municipal day care must be organised for children under school age, the age of seven. The mother, or the father, of a child under three years of age can choose to stay at home to look after his/her child if s/he prefers. In that case, the family receives a childcare allowance. Employers are obligated to give their employees what is known as extended parental leave.177

According to the reform of the Constitution Act completed in 1995, gender equality must be promoted both in social activities and in working life. In the same year the provision in the Act on Equality between Women and Men (the Equality Act), concerning the obligation of authorities to promote gender equality, was supplemented by a statement whereby all authorities shall act in a determined and methodical manner and remove any obstacles of equality. In keeping with the mainstreaming principle, such measures must be taken in all sectors of public authority. Furthermore, the Equality Act stipulates that government committees, municipal bodies and the executive and administrative bodies in public authority and municipal and state-majority companies shall comprise an equitable proportion of both women and men.178

Equality Act (1995) briefly:
- aims at promoting equality between women and men;
- prevents direct and indirect discrimination based on gender;
- improves the status of women particularly in working life;
- facilitates the reconciliation of working life and family life for women and men;
- prohibits discrimination in advertising jobs and training vacancies;
- gives those discriminated in working life a right to claim compensation;
- obliges the authorities to change such circumstances that prevent the achievement of equality;

176 Tiitinen 1999. He was the secretary-general of the Finnish Parliament at that time.
177 Manninen 1999.
178 A similar, more general, guideline was already included in the instructions for drafting government proposals; it stated that an evaluation should be made of the impact of these proposals on the economy, organisations, staff policies and the environment as well as on the status of the different non-governmental groups. Usually, however, little attention has been paid to the gender perspective. For example, a study of the government bills presented in 1994 showed that the impact of these bills on non-governmental groups was considered only in about ten percent of the cases. The figure was under one percent when it came to assessing the effect on the promotion of equality. Equality Programme of the Finnish Government, 1997.
• requires that men and women shall be provided equal opportunities for education and occupational advancement;
• demands an even distribution of male and female members in state and municipal bodies.

The Ombudsman for Equality monitors the observance of the Act.179 Equality matters fall within the scope of the Ministry of Social Affairs and Health in Finland. Those responsible for the practical implementation of equality are:
• Ombudsman for Equality works as an independent authority monitoring compliance with the Act on Equality between Women and Men.
• Equality Unit prepares the government’s gender equality policy. In addition, the Unit co-ordinates international issues related to the European Union, the United Nations, the Council of Europe, and the Nordic Council of Ministers.
• Council for Equality is a permanent body with advisory status within the state administration.
• Equality Boards tasks include monitoring the application of the equality legislation and the handling and solution of related issues.180

**Taxation and social entitlements**

Julkunen states that international feminism usually maintains a critical stance toward social welfare provision and its patriarchal roots. As said by the critiques, social security is partial to men, gives men the right to social security, strives to restrict women to the role of unpaid caregivers and forces them to depend on need-oriented social services. Albeit Finnish social security has some male-privileging aspects, women nevertheless perceive the welfare state as a supportive partner rather than an oppressor. Individualised allowances and social insurance benefits have been a priority in Finland. Separate taxation for marriage partners was initiated in 1974 and social security benefits are directed towards women as individuals (as citizens, employed persons, mothers), not as spouses.181

One of the standards for a women-friendly social policy has been the support of single mothers, that is, the opportunity to be a single mother without being subjected to poverty. In 1997, 39 percent of births were outside wedlock; in Sweden and Denmark the figures were higher at 54 percent and 46 percent respectively. Common law marriage is approaching the status of formally solemnised marriage and the reality is that a growing number of children are born in such stable relationships. Single motherhood is mainly the result of divorce. There are some income transfers to protect single parents, but their own paid employment provides their main income. Entry into the workforce is facilitated through inexpensive (or free) public day-care, and the Finnish working days are of reasonable length. However,

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180 Ministry of Social Affairs and Health, gender equality in Finland 2004.
181 Julkunen 2003. Further on gender and welfare states, see e.g., Sainsbury 1996; Digby & Stewart 1996.
single parents form one of the groups whose economic position weakened comparatively in the 1990s.\(^{182}\)

Finnish family policy aims to guarantee a safe growing environment for children and to ensure that parents have the material and psychological means for giving birth and rearing children. Using various forms of financial support and the childcare system, society compensates some of the costs of families with children. Family policy also seeks to give parents equal chances to take part in raising and caring for their children. The economic recession of the 1990s and its outcomes affected the material situation of families with children in many ways. Even though the majority of families were able to cope quite well, the numbers of young people, children and families with children who did not and who were in danger of exclusion, grew. In recent years the number of families with children has declined. At the same time, the family structures have changed, as the numbers of cohabitants, single parents and new families have increased.\(^{183}\)

Finland was the first country in the world (1978) to introduce separate fathering leave tied to the birth of a child (6–12 working days). Fathers have been taking advantage of it in growing numbers.\(^{184}\) On the whole, the financial support available for parents in present-day Finland includes the following benefits:\(^{185}\)

- Maternity grant
- Maternity, paternity and parental leave\(^{186}\)
- Family allowance
- Child maintenance support
- Special care allowance
- Child care allowance
- Subsidised daycare

The strong development of the day-care system for small children has enabled women to participate extensively in working life, and about 70 percent of mothers with young children do so. All children under school age (7 years) have the right to municipal day-care or, alternatively, their families can receive financial support for private day-care or home-care for their children.\(^{187}\) Altogether, the family services in the Finnish social policy also include:\(^{188}\)

- Maternity and child welfare clinics
- Maternity grant
- Family leave
- Child daycare and early childhood education

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\(^{182}\) Julkunen 2003.
\(^{183}\) Ministry of Social Affairs and Health, Family policy 2004.
\(^{184}\) Julkunen 2003.
\(^{185}\) Ministry of Social Affairs and Health, financial support 2004.
\(^{186}\) There are various forms of parental leave, e.g., maternal and paternal leaves, care leave, special care leave. Parental leave is paid for either by an earnings-related daily allowance or in the form of a homecare allowance. Ministry of Social Affairs and Health, parental leave 2004.
\(^{187}\) The Finnish social protection system, 2002; Basic elements in Finnish social protection 2001.
\(^{188}\) Ministry of Social Affairs and Health, family services 2004.
Child care subsidies
Family allowance
Child maintenance support
Paternity
Family guidance / child protection

Parents of a child under 3 years old have the right to receive a child home care allowance if the child is cared for at home. Also, the municipality can pay a private care allowance for arranging the care of an under school-aged child residing in Finland, the allowance being paid either to the private caregiver chosen by the parents or to a private day-care centre. Furthermore, when the mother or father’s period of entitlement to parental allowance has ended, each under school-aged child has the right to a municipal day-care place irrespective of the parents’ wealth and whether or not the parents work.  

Finland has been, and in many ways still is, more conservative than the other Nordic countries in the area of body rights. For example, rape occurring in marriage was criminalised as late as 1994, and family violence was made a matter for the public prosecution in 1995. There are also other signs of attitudinal patriarchy in Finland. The right of married women to retain their own last names and the right of women to become ordained did not occur until the 1980s. Finnish homosexual couples have been able to legalise their relationship since March 2002.

Current debate

In Finnish families both parents often work full-time, including mothers with small children. In addition, women in many families are still in charge of most domestic chores. Working life reconciled with family life has been a pillar of Finnish equality and family policy. Legislation has been used to promote this goal, but long-standing customs are persistent. For example, women are the ones who usually take parental and similar leaves, and this weakens their position on the labour market. Up to now, the majority of family policy measures have supported families with small children. The reorganisation of social welfare and health care will emphasise the need for care of other vulnerable groups, such as the elderly, the disabled and the chronically ill, who traditionally have relied on their families.

American Susan Faludi’s bestseller ‘Backlash’ points out that key objectives of equality policy include sovereignty over one’s own body and over one’s own money. For Finnish women being in charge of their “own money” has been the more important one. Finnish women are highly educated and their participation in the workforce is likewise one of the highest in the world (in 1996, about 71 percent of 15–64 year-olds) and certainly, since World War II, the highest in the western world. The

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189 Types of Social welfare functions 1999.
other Nordic countries have nevertheless by-passed Finland as concerns the participation in the workforce, and even the United States has caught up with Finland.\textsuperscript{192}

One of the objectives of the Finnish welfare model is economic equality between women and men. In practice, however, inequalities are still obvious. Despite the fact that working time arrangements and income transfers that help reconcile work and family life are meant for both women and men, they are mainly used by women, as stated above. This is a strain especially on employers in women-dominated sectors. Furthermore, women’s wages are lower than men’s, and a woman usually brings home a smaller pay cheque than her male partner. On the other hand, single men are the main beneficiaries of minimum income security. In working life, women still tend to do archetypal women’s work rather than working in strategically important positions. The Ombudsman for Equality monitors compliance with the Equality Act. Women’s organisations, labour market organisations, NGOs and a number of smaller organisations are also active in promoting equality in Finland. The Subcommittee on Men’s Issues within the Council for Equality encourages men to become interested in equality issues and studies men’s typical problems. A public or private sector employer that regularly employs a staff of at least 30 must include in the annual personnel and training plan or the action plan for labour protection workplace-specific measures to promote equality between men and women in the workplace.\textsuperscript{193}

In Finland, unlike in many other countries, collective labour agreements are favoured when salaries are negotiated. This is the result of the high degree of unionisation as well as the fact that collective labour agreements are binding on all employers and that the agreements have to be applied to non-unionised workers, too. Although the majority of unionised salaried workers are women, union negotiators are generally men, even when a woman chairs the union.\textsuperscript{194}

The current government agenda contains a comprehensive section on gender equality. It sets up an equality action plan, which, among other things, aims to achieve an income equality programme. Other areas covered by the action plan include women in leadership, fixed term service relations and the use of paternity leave. The cornerstone of gender equality policy is gender mainstreaming, both in Finland and in other EU countries. It aims for the development of policy conduct and assessment that incorporates a gender perspective in all sectors, levels and stages. Finland is currently renewing its equality legislation and making the gender impact assessment aspect of mainstreaming a pervasive part of all government administration.\textsuperscript{195}

The roles of women and men in the welfare sector

The topic of gender roles in the framework of the Finnish welfare policy has already been touched on in the previous sub-chapters.

\textsuperscript{192} In Finland participation in the workforce is further reduced because of early retirement by older age groups, both men and women. Julkunen 2003.

\textsuperscript{193} Towards genuine equality in the welfare society 2004.

\textsuperscript{194} Korvajärvi 203.

\textsuperscript{195} Ministry of Social Affairs and Health, Equality Policy 2004.
It can be concluded that in general women and men work in different professions in Finland. The majority of women serve, take care of and educate people. They work, for example, as sales assistants, cleaners, in various office and secretarial functions, in nursing and in childcare. The majority of men, in contrast, produce, handle and transport equipment. They work, for example, as drivers, in building construction, in repair and installation, and in business management. Women and men also work in different social sectors. Women work more often in the public sector whereas men are more private sector oriented. Less than one-fifth of all professions (18 percent) employ roughly equal numbers of women and men. These include chemists, doctors, newspaper deliverers, opticians, farmers, forest cultivators and journalists. Professions with equal gender proportions have changed in the course of the last two decades. The trend has been obvious: traditionally male professions have been feminised, but men have largely refrained from entering women’s professions.196

The statements and historic influence of the church on gender

The Evangelical Lutheran church of Finland has never been extremely active on gender issues. This may be better understood in the light of Sulkunen’s notion, cited above; women’s issues had to take the back seat at a time of conflicting pressures between a strong nationalist tendency, traditional agrarianism, and the democratisation of social life, but women were very visibly present in all reform-oriented activity.197

Gender and religion were, nonetheless, intertwined in the assembly of the Finnish work and moral reform in the 19th century. Women took on philanthropic work (e.g., founded orphanages, deaconess institutions, women home) and participated both in home mission and in social work rooted in revivalist religious values. In Markkola’s view, these women were altogether questioning the social effect of gender difference. She concludes that even in fairly homogenous Finland of the 19th century, the topic of gender and religion was a multi-faceted one. Religious moral and social reform movements empowered women, yet at the same time the movements identified proper field of activity for the genders.198

The first Finnish woman theologian graduated in 1913 and the question of women priests has been on agenda ever since, specifically starting from the 1940s. As Sweden approved the women priests in 1958, it had effects also on the discussions in Finland. In 1963 a post of parish lector was established for women priests in Finland. As mentioned in chapter 2.7, only in 1986 was the post of priest opened for women in Finland. The Finnish citizens had rather positive attitudes concerning the women priests already from the beginning – and still have. Today women are slightly under-presented in church administration; for instance, in parish administration.

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196 Korvajärvi 2003.
boards in 1998 there were 46 percent of women. In year 2000, altogether one fourth of the Finnish priests are women.\textsuperscript{199}

The Finnish church got a gender equality plan no earlier than December 1998. The church council aims, amongst other things, to even out the gender distribution in church council and the wage differences between men and women as well as other inequalities. According to the official gender equality plan, in the case of two equal applicants for a church council post, the applicant representing the minority sex must be chosen for the post.\textsuperscript{200}

The church of Finland has in recent decades published statements, or participated in consultation documents, on a variety of issues related to gender equality: for instance, concerning gender equality (1982), violence (1982), sexual crimes (1994), prostitution (1996) and domestic violence (2000).\textsuperscript{201}

Concluding remarks

The present social welfare situation is far from a play in which each player has distinct lines, roles, and responsibilities. In the era of welfare mix the roles of different agents are rather porous and, to a certain extent, continuously re-defined. The above description has illustrated numerous issues which have shaped and challenged the Finnish welfare system, and continue to do so. The present challenges such as growing regional development and ageing intersect with other trials, such as, long-term dependency on social assistance and high unemployment rates. How does the Finnish church relate to these challenges? The link between the Finnish welfare state (some prefer these days a concept of “welfare society”), the rather homogenous, shared culture and the still rather prominent role of the church pose an interesting case for deeper analysis.

The Finnish case study in Lahti town will be geared towards an understanding of the church’s activities in welfare. This research will answer the overall questions of 1) how do the church representatives view their role in welfare and 2) what kind of welfare promoting activities are they involved in? Answering these questions will include information concerning the definition of welfare by the church employees, the stated aims of the church welfare actions, its providers and recipients, and the co-operation of the church and other welfare agents. Furthermore, the study aims to find out 3) how the Lahti municipality representatives view the role of the church in welfare. The findings will be based on analysis of extensive interview research in Lahti town and documents on the social agenda of the church.

Altogether, these empirical findings will be put into the Finnish societal framework presented in this introduction. Also further analysis of official church documents will be conducted prior to the empirical analysis. In this way, the empirical

\textsuperscript{199} Helander 2003, 245–252.
\textsuperscript{200} Kirkon keskushallinnolle tasa-arvosuunnitelma 1998.
\textsuperscript{201} Hytönen 2003a, 256–171.
part of the research will offer new information on local church views and practices, as well as serve both as supplementary information and a tool for comparison between written, official church statements and the local practices in welfare. All in all, the coming inquiry on both overall societal and church discourse and local activities on welfare promotion will yield important knowledge concerning the role, motivation, and (perhaps also the question of) efficiency of the church welfare activities in the present challenging times of welfare mix.

The future analysis will also set the Finnish case in relation to the other countries of the WREP-research project. This will yield important insight concerning the extent to which the Finnish case poses a typical example of Scandinavian case or possesses unique features – and why.

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Welfare, Church and Gender in England

MARTHA MIDDLEMISS

The English welfare system

For the purposes of this study and its focus on the Church of England in references to national policy focus will also be on England although in terms of the welfare state as with many other national issues the system of welfare provision pertains to Britain as a whole. In Esping-Anderson’s model of welfare regimes Britain comes under the heading of Liberal welfare regime.1 It has what John Clarke et al. have described as a ‘mixed economy of welfare’ where the State directs and organises welfare while not necessarily acting as provider.2 The model exists as a balance between family, market, voluntary sector and public provision.

The basic framework of the welfare state was put in place by a series of acts introduced by the post World War Two labour Government governing health, social security and welfare benefits and which came into force in 1948. These acts were based on the recommendations of the Beveridge report 1942, which proposed a system of national insurance based on three basic principles. Family allowances, a national health service and full (male) employment.3 Despite considerable demographic, social and even some legislative changes over the past 50 years the basic framework of the post war Beveridge system remains in place and consequently current changes in society are stretching the system to its limits. These issues will be returned to shortly. However, it is important first to mention those reforms which the system has undergone during recent decades. Even if the basic framework has not been altered significant administrative reforms changing the administration of the system and backed by specific political programmes have meant that the roles played by different actors have altered considerably which in turn has altered the system as a whole.

Historical background

The post war system of welfare in Britain arose out of the need to rebuild the nation after the war economically, physically and psychologically. Economically the need was felt to harness the free market, albeit kept in check by memories of the Great Depression of the 1930’s. The subordination of Britain to the USA in the western alliance left its mark on the country that had been an imperial power and great

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1 Esping-Andersen 1999.
2 Clarke, Lanagan and Williams 2001a.
3 Beveridge 1942.
Emphasis was put on the development of the welfare state on values of citizenship and social solidarity profiling Britain as a moral leader in the world. The system did not however come out of nowhere and built on welfare policies that had been introduced over the first years of the 20th century. Developments that had, for the most part, come about as attempts to avoid reliance on the Poor Laws, which were generally despised. These laws had dominated British social policy from 1601, were built on the parish system and concentrated on poor relief. The 1834 Poor Law Amendment Act, responding to increased costs following the Industrial Revolution and which was in force until 1948, concentrated on two principles, less eligibility and relief in the workhouse. The new system based on social insurance was seen by many as a more universal form of provision, although whether this proved to be so in practice is debatable. In fact the poor law tradition has continued to live on in the concern of the British system with the alleviation of poverty. At the beginning of the century voluntary organisations representing middle class philanthropy (much of which was tied to the churches) as well as working class friendly organisations worked in partnership with the state over and above the Poor Law legislation and were seen as part of the country’s welfare system working with the same values as the state. During the early years of the 1900’s however the state gradually took over more and more control of the sector and by the 1930’s, Lewis writes, the voluntary organisations were seen rather as a supplement to public services. Part of the ideological background to these changes was the foreign policy of the country and the need to appease the working class to ensure industrial supremacy as well as a skilled and healthy army to defend the empire. The family was therefore central in a policy that focused on ‘race’ and national identity and this in turn resulted in policies which kept women as wives and mothers in the home, out of the employment sector and excluded from some benefits, this despite the important role that women had played as workers in factories and on the land during wartime. Some benefits were also restricted to British nationals illustrating a close relationship between immigration and welfare policies and highlighting the ideals of British culture as white, English speaking and Christian, which lay behind much welfare thinking of the period. While the notion of imperialism disappeared as a basis for welfare policy post world war two it can be seen that many of the values of the pre war welfare system continued. The reforms following the Beveridge report met some of the needs of social construction and the demands of the labour movement strengthened by the ethos of solidarity and democracy which followed the experience of collective responsibility in wartime, while continuing to emphasise the role of the traditional family in British culture.\footnote{Lewis 2001, 11.} \footnote{Lewis 2001, 10.} \footnote{Lewis 1999.} \footnote{See Clarke, Lanagan and Williams 2001 and Spicker 2004 for further detail.}
The welfare state post 1948

The post war system was based on the pivotal concept of full male employment with a corresponding family economy where women provided housework, childcare and other physical and emotional support in return for financial support. The state was therefore seen as a support to the family economy and a woman’s place in the welfare system was as a dependent. An active connection was made between participation in the labour market and benefit provision in an attempt to remove some of the judgmental nature of the poor law system and yet retain a notion of individual responsibility. The state did however take on the role of primary provider in the fields of health and education and here state provision expanded in those areas which were perceived to be most important. Primary health care in particular was prioritised while areas such as personal social services, for some of the most vulnerable in society received fewer resources and developed at a much slower rate. In those areas of welfare where responsibility for provision had been given to local authorities the voluntary sector continued to play a significant role. Voluntary bodies, part financed by the local authorities provided and developed services which the local authorities themselves did not have the capacity to produce. The role of the voluntary services thus remained central to the provision of health care and welfare as the role of the private sector continued with the provision of private education, occupational pension schemes and private health insurance alongside public provision.

It must also be remembered that a significant number of key English institutions are founded and continue to depend on the contributions of laymen and women who are not reimbursed for their work. The judicial system makes use of lay magistrates (Justices of the Peace) to serve local courts, while the national crown courts rely on the system of trial by jury whereby all citizens have the right to be tried by their peers, who are obliged to serve when called upon. The school system too has the voluntary involvement of local citizens built into it. Many state schools have boards of governors, often members of the local community, who along with the head teacher control the development of the school and are often responsible for the appointment of the teaching and managerial staff. These two examples serve to show the extent to which the notion of the involvement of non professionals, who give their time for free, is embedded in English society and helps to explain the acceptance of the role of voluntary bodies as an integral part of the welfare system.

Reform in two stages

The international economic boom in the decades following the war combined with a baby boom during the same period allowed for an expansion of welfare services within the existing framework. Growing prosperity along with demographic growth amongst the very young and the very old increased both expectations and demand
and this coupled with a perception of Britain as being in relative decline as rates of
growth remained below those of her international competitors led to a political
programme of modernisation in which welfare services were to play a key role. This
first phase of reforms of the welfare system in the 1960’s and 1970’s
introduced a system where finances were allocated centrally from government to
departments and then from departments to services.

The recession of the 1970’s ensured support for the emerging New Right theory
that expansion of the public sector denies resources to the market sector. This
became the corner stone of the agenda of the conservative party from the 1970’s
onwards who sought to curtail the role of the state, arguing that a strong state
welfare system was both a disincentive to work and a demoralising factor taking
away the feeling of personal responsibility for one’s own welfare. Here as ever an
ideology of the family was an important factor. The family was seen as the guardian
of the morals and culture of society and the locus of personal responsibility for
welfare in terms of choices made in a free market. The focus was in other words on
the market and the individual and family9 and the reforms of the 1980’s and 90’s
broke up the administration of public welfare into agencies, introduced management
systems and quasi markets where competition is introduced and the purchase and
 provision of services are disconnected from one another. Welfare was consumerised
and the voluntary sector and private sectors both had a role to play through entering
into partnership with the State. The family was given a significant role to play both
in carrying out welfare work and in making choices. Women in particular took on
much in terms of hidden welfare work during this period as much care that had
taken place in hospitals and institutions was moved ‘into the community’.10 One
area that is a good example of these policies and which is unique to the UK is
housing policy. The provision of affordable basic housing had been a major feature
of the post war welfare state, but from the early 1980s the general shift in focus to
the individual led to an explicit policy of encouraging home ownership which
included the wholesale sale of council housing. In the same period and the
following years cuts in funding to local authorities for housing led to rises in rent to
fund costs which in turn led to large scale dependency on housing benefit. In recent
years housing benefit has become a major feature social security support and crucial
income for the unemployed in particular.11

These developments mean that it is now vital in Britain to make a distinction
between the public sector and the State. The role of the public sector has changed
dramatically, but the State still retains overall control over welfare.

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10 for further detail see Spicker 2004; Oakland 1998 and Clarke, Lanagan and Williams 2001b.
11 Clasen 2003, 577.
Britain and America

It is important at this stage to note the historical and ideological connection which Britain has with the USA in the field of welfare politics and which sets it apart from its European neighbours with whom it otherwise has much in common. Historically British and US policies have a connection both in terms of philosophy and structure. As King has argued they share a common structure in differentiating between core benefits (such as National Insurance benefits in the UK) and benefits such as Income support which are stigmatised.12 Underlying this structure is a philosophy of welfare where social assistance is considered to be a favour rather than an entitlement. The combination of these two, Daguerre argues, set the scene for the welfare politics of the 1990s in both countries and explain the convergence in the welfare systems which were able to learn from each other.13 The clearest example of this which still underpins the welfare system in Britain today and has become a lynchpin of the Labour government’s welfare policy portfolio is ‘Welfare to Work’ policy. A policy of enabling and encouraging as many people of working age as possible to participate in the labour market with the aim of improving the economy in general and increasing the working population who fund welfare for the very young and the very old and of enabling individuals to support themselves as pensioners to a greater extent. A policy which can work in the American and British labour markets, which are relatively low skill and low wage, where it would not fare so well in the more highly selective environments of European labour markets.14 This said it must be emphasised that influences on the UK do not come solely from the other side of the Atlantic Clare Annesley argues that while Americanisation and Europeanisation are distinct both in terms of content and process they currently have a simultaneous and not mutually exclusive influence on developments in the UK.15 The welfare to work policy is a good example of Annesley’s point. The UK may have gone down the same path as the US in its workfare programmes, but there are significant differences in the levels of compulsion, of regulation of the labour market, and state sponsored childcare initiatives, which show the European influence on Britain.16

The welfare state today

The focus of national welfare policy at the beginning of the 21st Century remains cost containment and the amelioration of poverty.17 The current framework for the organisation of welfare services in the country has been in place since 1997. Reforms at this time redefined the areas of responsibility of government depart-

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12 King 1995.
13 Daguerre 2004, 52.
14 Daguerre 2004, 53.
16 Annesley 2003, 161.
17 Clasen 2003, 574.
ments, which are in turn responsible for setting the agenda both for the National institutions within their particular field, but also for developing national policy for those areas of welfare provision which fall under local government control. Local authorities may be responsible for providing a number of specified services, but have very little power to conduct work outside of the remit of parliament or to raise funds. A ‘council tax’ exists which is collected by local government to fund public services, but the rates at which this can be set are closely controlled by government and as the majority of local authority income comes in the form of grants from central government (ca 80 percent) central power is significant. Conservative reforms (1979–97), which have already been briefly mentioned had a wide reaching impact on the provision of local services, not least because one of these reforms made councils ‘enabling authorities’ with the responsibility for ensuring services were provided, but without the obligation to provide them directly. Councils were instead encouraged to open up to a process of tendering for a wide variety of services introducing a market in service provision in which both the private sector and voluntary and community organisations (VCOs) could compete. This applied largely to the private sector however and the role of the voluntary and community sector (VCS) remains largely in the provision of services which complement state provision although the boundaries are debatable. Most voluntary agencies have charitable status, which means that they have tax concessions on income. This however isn’t the only government provision designed to support the VCS, it is clear that the government is aware of the huge contribution made by such groups and of the fact that they are an essential element in welfare provision at the present time. One example of this is the Cross Cutting Review undertaken by the Treasury in 2002, ‘The Role of the Voluntary and Community Sector in Service Delivery.’ In his foreword to the report the Chief Secretary to the Treasury and Lead Minister for the Review said

This Government is passionately committed to the work of the voluntary sector. We believe that voluntary and community sector organisations have a crucial role to play in the reform of our public services and reinvigoration of civic life. We in government cannot do this on our own.18

The review reports NCVO estimates that nearly 30 percent of the income of ‘general charities’19 in the UK in 2000–1 came from government at local or national level although this is clearly focused on charities working with particular priority areas for government or areas where government can’t or won’t provide the services needed. The majority of central government funding to VCOs was in the area of development and housing20 and for local authorities the social services were by far the most significant service area.21 During 2000–1 the NHS also allocated 1.4 percent of its spending to VCOs.22 The funding of VCOs lay at the time of the report at around 3 percent of total local authority expenditure, which represents a doubling

19 HM Treasury 2002, 10 §2.7.
20 HM Treasury 2002, 12 §2.11.
of the 1.5 percent allocation for most of the 1980s. The report attributes this rise to the impact of community care reforms during this period, which also had a significant impact on the role of families in the welfare sector. The Compact, a framework for partnership between the VCS and Government envisaged as a guide to good practice, set up in 1998 is another example of the Government’s reliance on and eagerness to both encourage and harness the potential of the VCS. The review highlights the potential for a ‘value added’ element to services provided by the VCS and in the light of these observations and the conclusion that government funding is an increasingly important source of finance for the sector introduced a one off investment in to a fund entitled “future builders” to ‘assist VCOs in their public service work’ and further annual funding for the implementation of the review based at the ‘Active Community Unit’ at the Home Office.

As noted above families play an integral role in the welfare system in the form of individuals providing care for sick, disabled or elderly friends both in their own households and in others. Statistics from the Census in 2001 revealed over 5.2 million unpaid carers in England and Wales providing care for a family member or friend with a million of these providing over 50 hours care per week. Figures from the General Household survey show that in 2000 16 percent of those aged 16 and over in Britain were caring for a sick, disabled or elderly person, figures which represent one household in every five in Britain containing at least one carer. About a third of these were looking after someone in his or her own home. As a percentage of all carers 21 percent were looking after a friend or neighbour while the remaining majority cared for relatives. 4 percent of adults were spending 20 hours a week or more on their caring tasks and in this group with significant responsibilities care for family members is even more dominant with 93 percent caring for family members, nearly half care for a wife or husband (45 percent) and 33 percent for a parent. 45 percent of carers in the country were aged 45 to 65 percent and of those spending over 20 hours a week caring 40 percent were in this age group. This represents a significant number of people looking after a partner or elderly relative. The figures show therefore the crucial role that the family plays in the care of the elderly within the welfare system. Of those caring for someone outside of their own home (that is 11 percent of the population) 83 percent were looking after someone aged 65 or over and the largest group of carers (38 percent) were caring for a parent.

This focus on family, voluntary sector and market combined with the increased domination of means testing in social security support indicates the move that has taken place in welfare policy away from the Beveridgean basic (non means tested)

24 HM Treasury 2002, 17 §3.1.
27 HM Treasury 2002, 31 §8.3.
29 Mahler and Green 2002, 1.
security to a system based on labour market (re)integration supported only secondly by needs based minimum support.\textsuperscript{32}

**Challenges to the welfare system**

The welfare system has been put under considerable strain in the decades following its conception due to a number of demographic and social factors. The General Household Survey has monitored such changes over the past 30 years and their figures reveal several important trends with implications for the welfare system. Since 1971 the proportion of people in Britain aged 75 and over has risen from 4 percent to 7 percent while the proportion of those aged under 16 has declined.\textsuperscript{33} Households with one or more members over the age of 60 now represent 30 percent of the total. These figures represent an increasing number of pensioners drawing on a welfare system supported by a shrinking workforce.

Family and household composition have also changed dramatically testing a system based on male employment and representing changes which could have important consequences for a system which relies on large amounts of informal care provided by family members. Household size has shrunk in particular influenced by the fact that the proportion of one-person households has almost doubled since 1971.\textsuperscript{34} This change is also closely connected to changes in family make-up with a decline in the number of families with dependent children which are headed by a couple. Lone parents represented only 8 percent of families with dependent children in 1971, but this figure had risen to 25 percent in 2001. This growth is mainly constituted of a rise in the numbers of lone mothers (7 percent to 22 percent) while lone fathers still only represent 3 percent of the total.\textsuperscript{35} These figures are of particular significance when compared with research which shows that lone parents are much less likely than their married or cohabiting counterparts not to be in paid employment and therefore to be dependent on state benefits.\textsuperscript{36}

In addition to these large scale changes, differences can also be seen today in working patterns. Unemployment amongst men is much higher than it was 50 years ago, women now make up nearly half of the workforce as opposed to 30 percent in Beveridge’s day and there is an increased ‘flexibility’ in the labour market with many more people working part time and in a self employed capacity. The capacity of the labour market to support the welfare state has also shrunk. There are now only one in three people of working age to every pensioner, a drop from one in five post World War Two.\textsuperscript{37} These factors and factors such as upwards trends in the use of health services\textsuperscript{38} have contributed to a situation where government funding of

\textsuperscript{32} Clasen 2003, 581.
\textsuperscript{33} Office for National Statistics 2001, 5.
\textsuperscript{34} Office for National Statistics 2001, 16 table 3.2.
\textsuperscript{35} Office for National Statistics 2001, 19 table 3.6.
\textsuperscript{36} Bradshaw, Jonathan et al. 2003, 18f.
\textsuperscript{38} Office for National Statistics 2001, 7.
social services at the end of the twentieth century represented 30 pence in every pound spent, a rise from 13.5 in 1949.39

Generally speaking these trends seem set to continue, however recent research does point to an alteration in certain trends. Two such indicators are worth mentioning here. Research undertaken on behalf of Skipton Building Society in March/April 2004 predicts a rise over the next 20 years in the numbers of extended families from 75,000 at the present time to 200,000 in 2024. The report defines extended families as three generations living in the same house and attributes this increase, which goes against the movement of past decades, to smaller families and to an increase in the “personal privatisation” of welfare services with costs for education, health and welfare previously shouldered by the state being transferred to individuals. This along with pension under funding, increased child care costs, higher levels of debt and rising property costs will, the report predicts, make a combining of incomes and sharing of mortgage repayments the only alternatives for some while shared living combines, in the best instance, cuts in costs for childcare with savings in the expense of residential care for elderly relatives.40

The second reversal of a long term trend, which is beginning to be seen by researchers, is of the defeminisation of old age. The authors of the report ‘Ageing and gender: diversity and change’41 argue that the increase in the elderly population in the UK has been only modest over the past 30 years, in particular if compared to the rest of Europe. However, they write, this modest increase hides substantial changes in both age and gender composition of this group. Rapid growth can be seen in the section aged 85 and over which shows advances in health care, but also puts a strain on the system, although costs for these individuals have as close a relationship to the existence, or not of informal care networks as to chronological age. Currently this cohort of the oldest in society is predominantly female, but the ratio of men to women is falling and a faster reduction in male than in female mortality means a projected fall from three times more women than men aged over 90 in 2001 to twice as many women in 2021.42 This defeminisation of later life, along with an increase in both cohabitation and divorce is changing the patterns of marital status later in life, which in turn has an impact on the dependence of elderly people on care from relatives and friends outside the home and from the state. Currently the majority of men who reach old age remain married until they die, while the norm for women is widowhood. The predicted changes in the report, and in particular increases in the number of elderly divorcees however have implications for welfare policy in general and pensions policy in particular.43

Current debate

Without conducting a full study of media reports in England over a longer period it is difficult to single out with authority the major issues in current debate at the present time. However a more basic scan of the national press combined with a study of the prioritised aims of government departments give an indication of those issues which are high on the national agenda. One area which always receives considerable attention in the press is health and in particular issues concerning the efficiency and finance of the National Health Service (NHS). The NHS remains, as an overarching healthcare system, largely free at point of contact, but has been severely under funded in recent decades. This is clearly reflected in government policy which expressly prioritises improving efficiency in the NHS and cutting waiting lists. In addition the government aims to improve the general health of the nation and to remove inequalities in health which can currently be seen to be aligned with the financial situation and place of residence of the individuals. Such issues are also frequently addressed in the media in articles concerning the health of the nation and public fear of a ‘postcode lottery’ in health care. Issues of health care overlap in the public domain with issues of public sector staffing. Considerable attention has been paid in recent months to the pay and working conditions for public sector staff in a range of service provision areas. Public solidarity with the staff concerned is however tempered by a fear of rising costs for welfare and education. At a policy level this situation involves active recruitment drives and incentives for entering a number of fields, not least teaching and nursing alongside hard fought battles for pay rises. The Home office has clearly articulated policy priorities of cutting crime and improving community relations. This involves an active policy of encouraging the voluntary and community sector particularly in areas of urban deprivation. Crime and its effects on society as a whole fill many column inches too, not least with reference to juvenile crime and both preventative strategies, including regeneration as well as conditions in the country’s prisons.

Like the Health service the social services are often also a focus of public debate both in terms of cost and efficiency. The government’s focus on welfare to work is mirrored in the press in concern over levels of unemployment, access to benefits and the situation for the elderly when pensions and the cost of living do not coincide. Once again in the history of the English welfare system the close connection between welfare and immigration policy can be seen as part of the debate surrounding benefits, not least following the Prime Minister’s comments, only days before the integration of 10 new states into the EU, that citizens of new member states would have the right to work, but not to claim benefits in the UK.

44 Department of Health: 2003.
The role of the church in the welfare system

The official theological self-understanding of the Church

The influence of the English reformation in the doctrine of the Church of England is very clear. The catalyst for the creation of the Church of England may have been the marriage of Henry VIII, but it would not have been possible had there not existed an interest in theological reform amongst some prominent churchmen of the day. The doctrine of the Church therefore has grown, not from written confessions, as with the protestant churches, or conciliar decrees as for the Roman Catholic Church, but from compromise between two factions of the Church with tensions inherent in the Church’s understanding of itself from the beginning as both catholic and reformed. The liturgy of the Church in the Prayer book expresses the understanding that the Church of England is one part of the one Church of Christ and in line with this Anglican apologetic has often asserted that Anglicanism has no specific doctrines of its own and that Anglicans believe what is common to all Christendom. This may be true in so far as Anglican doctrine exists nowhere as a set of documents, but rather rests on interpretation of Scripture and the Creeds, the problem however comes when the question is raised as to where the limits for acceptable interpretations should be set and where the authority to determine such limits is located.

In the context of a debate over the limits of biblical authority Richard Hooker, the acknowledged father of the Anglican intellectual tradition laid out three elements of a theological method in his ‘Of the laws of Ecclesiastical Polity’ which have served as a yardstick for Anglican theologians ever since, namely Scripture, Reason and Tradition. Implicit in this method is the understanding that the individual will use his God given faculties to interpret scripture in the light of the wisdom and learning available to him in the traditions of the Church. The Thirty-nine articles, Prayer book and Ecclesiastical Canons are therefore one part of this tradition. Far from being a dogmatic approach therefore the Anglican theological tradition allows, for an enquiring approach to theology. Perhaps for this reason an emphasis on the ‘via media’ or middle way has long been a defining feature of the Anglican tradition and an emphasis on this and on the value of critical reasoning has led to a theological tradition tolerant of diversity, sustaining communal decision making processes, which rely on consensus politics to clarify doctrinal positions. Thus to this day official reports of the commissions of the Church and of the House of Bishops are compiled in this manner and on first publication represent a consensus of opinion of the members of the group, which may then at a later date be ratified by the General Synod of the Church. To what extent this theological tradition has grown out of the necessity of holding together a diverse Church, both nationally and in terms of the world wide Anglican communion, and to what extent the diversity of the Church has increased because of the theological tradition is impossible to quantify.

* Hooker 1907.
One area where the mixture of Protestant and Catholic tradition is clear in Anglican theology is in the area of pastoral theology. In many ways the Anglican church has developed in ways similar to those of its Protestant neighbours, the opening up of the funeral liturgy in 2000, for example shows a move on the part of the Church of England away from a Catholic understanding of the role of the funeral service, with its focus on the life after this, to a more pastoral response focused on the individual who has died and the grieving family. Nonetheless the Church of England has never fully embraced the Protestant understanding of the diaconate or gone down the road of developing a pastoral theology based on a concept of ‘Diakonia’ as in Germany and Scandinavia. The role of the Deacon in the Church of England is, it is emphasised, part of the threefold ordained ministry yet elements remain of the Roman Catholic understanding of the role as a transitory phase (all priests in the Church of England serve as deacons for a year before their ordination to the priesthood) although many become deacons with the intention of entering a permanent diaconate.47 Unlike the majority of their Scandinavian counterparts Deacons in the Church of England are not expected to have training in nursing, social work or similar and emphasis is placed on the liturgical role and on the Deacon as link between Eucharist and World.48

A second aspect of the Church’s self understanding, which has both sociological and theological implications and therefore must be mentioned briefly here is the Church’s view of its role in the Nation. There is not space for a full discussion of this issue here, except to say that the Church’s role as the established church has led to a development of a theological understanding of the Church as the Church of the Nation, with the resulting practical implications of a geographically organised responsibility to all citizens of the Nation and a duty to both support and criticise the representatives and systems of political power. Opinions on this amongst representatives of the Church are however closely aligned with attitudes to the relationship between Church and State. Opponents of establishment often also oppose theologies upholding the link between Church and State as elitist and irrelevant in the modern world, where a Christian moral is no longer the common element in society.49

Relationship Church and state

The Church of England is the Established Church of England, although England has no written constitution and neither is there one document or Act of Parliament which secures the status of the Church in the Nation. The nature of establishment is rather defined through the series of relationships which Church and State have to one another which are manifested as privileges and advantages, but also as 47 A situation reinforced in the years before the decision to allow the ordination of women to the priesthood, when women were ordained Deacon, but did not progress to the priesthood along with their male colleagues.
48 For further discussion see Hall 1999.
restrictions and limitations for the Church. The Queen is the Supreme Governor of
the Church and in the Coronation Oath promises to uphold the ‘Protestant reformed
religion established by law’ and to ‘maintain and preserve inviolably the settlement
of the Church of England, and the doctrine, worship, discipline and government
thereof, as by law established in England.’ The Monarch is thereby obliged to be
in communion with the Church of England and is crowned by the Archbishop of
Canterbury, the Church has responsibility for religious services associated with
important events in national life. In addition certain positions in National life can
only be filled by Anglican clergy and 26 senior Bishops of the Church sit as
members of the House of Lords. The Monarch has no spiritual role although the
Queen is, via her Prime Minister, responsible for the appointment of Bishops. The
power that this arrangement gives to politicians to influence the running of the
Church has long been used by those in favour of disestablishment as a significant
argument in favour of their position.

The Church has held four investigations into the possibility of Church-State dis-
establishment over the past hundred years, but none of these has resulted in signific-
ant change and although there are those who campaign actively for this cause the
Church and State remain closely connected albeit with some modifications. William
Temple was never a campaigner for disestablishment, but the Life and Liberty
campaign, which he set up in 1917 achieved perhaps the greatest modification in
Church State relations in the history of the modern Church. The campaign for a
greater amount of control for the Church over its internal affairs and matters
spiritual resulted in the Enabling Act (1919) which created the Church Assembly
and was intended to free up parliament, who no longer had time for ecclesiastical
business. The decisions of the Church Assembly were however still subject to
parliamentary approval and the minor nature of the change was seen in 1927 when
the proposed new prayer book which had been approved by the Church Assembly
was rejected by parliament. A Measure in 1969 gave the General Synod (the body
which replaced the General Assembly following a number of reforms to make the
system more effective, tie national structures closer to dioceses and parishes and
give the Laity a more influence) most of its legislative authority in ecclesiastical
affairs. Nonetheless final authority continues to rest with parliament which, when a
measure has passed through all of its stages, must either accept or reject it. In 1974
further powers were given by parliament to the Church to enable it to make its own
provisions for forms of service, within certain boundaries.

In practice the connection between Church and state also has implications for
the work of the Church at a local, parish level. The network of parish churches in
England is ancient and many rural parishes correspond to village boundaries. The
situation in towns is somewhat different given the huge rise in urban populations
following the industrial revolution, but here too boundaries often coincide with
local administrative areas. The clergy of a parish have a pastoral responsibility for

\[50\] Welsby 1985, 45.
\[51\] The second chamber of parliament in Britain.
\[52\] Dyson 1985.
those resident in the geographical area regardless of whether they are baptised members of the Church. Residents of a parish have a legal right to the performance of a certain minimum of authorised services in their parish church, parishioners also have the right to have their child baptised by the incumbent, to be married in the church of the parish and to be buried in the churchyard of their parish or of the parish where they happen to die. Residents of the parish over 16 years of age who are baptised and members of the Church, or of a church in communion with the Church of England are also entitled to enter their name on the Electoral Role and thereby to participate in Church elections. Even those who have regularly attended public worship over a period of 6 months in a parish where they are not resident have this right and the corresponding rights to pastoral services.53

Church membership/affiliation

29.8 percent of respondents to the British Social attitudes survey say they belong to the Church of England.54 This can be compared to the responses to the ORB survey commissioned by the Church of England in 2001 where 25 percent of respondents classed themselves as ‘members’ of the Anglican church and 27 percent said that they had an Anglican affiliation and would, for example, list the Church of England on admission to hospital.55 Parish Electoral Rolls are an indication of the numbers of more active members of the Church. Figures from the six yearly revision in 2003 show a 7 percent decrease from 1996 with 1.2 million adults aged 16 or over registered.56 It must be noted however that the fact that a significant factor taken into account when calculating the size of the parish share (the annual financial contribution paid by the parish to the diocese) is the size of the electoral role can act as a disincentive to actively encourage individuals to sign up.57 The average weekly figures for attendance at church services each week and specifically on Sundays dropped by 3 percent and 4 percent respectively between 2001 and 2002 but remain on average 1.2 million people 1 million of these on a Sunday.58 Figures from an ORB poll on behalf of the Church of England in 2003 also show that 39 percent of the population attend a church/ place of worship at Christmas.59 2.6 million attended a Church of England church or Cathedral on Christmas Eve or Christmas Day 2001 and 1.6 million attended on Easter Day.60

54 British Social Attitudes Survey, National Centre for Research.
57 There is however no empirical evidence of the impact of this.
58 Average weekly attendance 2001 1,205,000; 2002 1,166,000. Average Sunday attendance 2001 1,031,000; 2002 937,000. Taken from Provisional 2002 Statistics for Mission: http://www.england.anglican.org/papers/ 2002 Church-attendance.pdf.
59 Church of England 2003, Table 10.
60 Archbishops’ Council, 2003a, 17–18.
Pastoral services

Figures for 2001 show that about 161,110 infants, children and adults were baptised in the Church of England that year. The numbers of children, young people and adults being baptised has remained fairly stable at around 46,000 per year since the beginning of the 1990’s while figures clearly show a steady decline in infant baptisms. In 2001 70 percent of those baptised were infants while in 1990 80 percent were infants. Current figures represent a rate of 198 baptisms per 1,000 live births. Since 2000 parishes have also collected statistics relating to the other occasional offices of the Church, by which are meant funerals, marriages, blessings of civil marriage and thanksgivings. In 2001 51 percent of these were funerals, 35 percent Baptisms and thanksgivings and 14 percent marriages and blessings of civil marriage. There was a 4 percent drop in the numbers of occasional offices taken between 2000 and 2001, but on average every stipendiary parish clergyperson performs one such service a week. Church of England parish funerals represent 46 percent of all deaths in England and of these 228,000 funerals performed by a minister from the Church of England in 2001 104,100 were held in a church and 123,800 in crematoria/cemeteries. In 2001 Church of England/ Church in Wales marriages made up 24 percent of all marriages performed in England and Wales. Attendance levels at these services are not recorded, but the ORB survey from 2003 indicates that 59 percent of the population attended a funeral in a church/place of worship in the past year, 49 percent a wedding and 37 percent a Baptism.

Church buildings

In addition to the pastoral services which the Church carries out and through which many people come into contact with the Church and make use of its buildings. The Church building itself is often a local Landmark and important for many as the venue for memorable family events, sometimes over several generations. The Church hall too, which exists in many parishes, is frequently a social centre as the venue for everything from children’s birthday parties to yoga classes. In rural communities in particular the church hall may be the only suitable venue available for hire for such activities and so while the events themselves may have nothing to do with the Church the building will be known to local people. The results of the ORB survey show that Church buildings also have a place in people’s everyday lives. Of those who were questioned 73 percent said that they thought of their local church or chapel as a quiet place or sanctuary and 56 percent saw it as a social or community venue. 86 percent of respondents had attended a place of worship over the last year. Many had attended funerals, weddings and baptisms, but 17 percent

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62 for an explanation of this term see page 19 under costs of ministry.
63 Archbishops’ Council, 2003a, 11.
64 Archbishops’ Council, 2003a, 10.
65 Church of England 2003, Table 10.
Welfare, Church and Gender in England

said they had been for a concert or theatrical performance, 19 percent because they were seeking a quiet place and 13 percent responded that they were walking past and felt the need to go in. In addition 16 percent answered that they had attended a church/place of worship through their children’s school. Perhaps an unsurprising figure when related to the fact that Church of England schools make up 21.9 percent of all state maintained schools in England and 25 percent of primary schools.

Church schools

While a full analysis of the role of the Church in the education sector in England would require a report of its own the significant role of the Church in this field, which clearly adjoins the welfare sector, and the impact that this has on the place of the Church in society in general necessitates a brief explanation of the current situation. The Church works in partnership with Local Education Authorities (LEAs) in running three different kinds of school. The main differences being the extent of influence and control which the Church has a right to extend over the school in question.

Voluntary aided is the term for schools where the Church has maximum authority. Here the school is owned by the Church which appoints a majority of the governors. Teachers are both appointed and employed by the governing body and the same body has responsibility for securing funding to cover the costs of repairs and capital projects, albeit with 90 percent grants from the Department for Education and Skills. The governing body also controls admissions and both religious education and worship in such schools are distinctly Anglican. In voluntary controlled schools the schools is also owned by the Church which appoints governors, but here they do not make up the majority of the governing body. Teachers are employed by the LEA and the same authority has financial responsibility for the fabric of the building. Religious education in these schools follows the local agreed syllabus, but worship is Anglican. In the third category, foundation schools, the school is owned by the foundation, the governing body controls both the employment of staff and admissions and the Church appoints a minority of governors. Worship and religious education follow the same pattern as voluntary controlled schools. In addition the Church runs two different types of independent schools Academies, which are owned by their trustees, non-fee paying and have a Church of England character and Other independent schools which are fee paying and have a church of England character. 1,000 of the 1,300 independent schools in the country have a Church of England ethos. This is an interesting figure as regards the place of the Church in society given the fact that individuals educated at independent schools represent a significant number of those at prestige filled Universities and in both politics and the civil service. It is common in both Church and non-church schools, although by no means the case for all schools, for the local

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priest to act as chairman of governors and also to attend the school regularly to lead
simple acts of worship at the beginning of the school day. All Church schools
welcome all pupils from their local area including those of other faiths, but have
admission policies in the case of shortage of places. These policies are set by the
governors in all schools but voluntary controlled (where they are set by the LEA),
and vary from school to school, but may take into account such factors as
involvement in the local church.

Many Church schools perform well and have a good reputation in their local
community. Given this fact and following a report by the Dearing Commission into
church schools in 2001 the General Synod of the Church set in motion a plan to
open an additional 100 Church secondary schools. 40 have either opened or are due
to open during 2004 and a further 30 are at various stages of planning.68

Other religious communities in the country

In response to a voluntary question in the 2001 Census in England and Wales 71.7
percent of the population replied that their religion was Christian, 3 percent
identified themselves as Muslim, 1.1 percent Hindu, 0.6 percent Sikh, 0.5 percent
Jewish and 0.3 percent Buddhist. 0.3 percent replied that they had some other
religion and 14.8 percent that they had no religion.69 The category ‘other’ represents
a wide variety of religions and beliefs including the other three religions frequently
categorised as the ‘historic religions of Britain’ Zoroastrianism, Jainism and the
Bahá’í faith.70

The British Social Attitudes Survey carried out in 2000 yielded slightly different
results, not least in the figures of those who had no religion. Here the figure was
39.5 percent, the biggest difference showing in the number professing to be
Christian, here only 55.2 percent This can however possibly be explained by
differences in the wording of the question. Here individuals were asked if they
belong to a religion.71 It must however be remembered that these figures encompass
the whole of Britain and not just England.

This survey also shows the affiliation to Christian denominations other than the
Church of England. Here 9.2 percent said that they belonged to the Roman Catholic
Church, 6.3 percent that they were Christian, but of no denomination, 3.5 percent
Presbyterian/ Church of Scotland, 3.5 percent Baptist or Methodist, 2.5 percent
Other Protestant, 0.5 percent United Reform Church.

68 For further information on Church of England Schools see http://www.england.anglican.org/about/education/schools.
69 Census 2001, Office for National Statistics Question asked ‘What is your Religion?’.
70 For more information about the different faith communities in Britain and links to different faith communities see
The Interfaith Network for the United Kingdom.
http://www.interfaith.co.uk/.
71 British Social Attitudes Survey, National Centre for Research. Question: ‘Do you regard yourself as belonging to a
religion?’
Ecumenical relations

Despite the fact that the figures detailing affiliation to denominations other than the Church of England are low they do represent a significant number of actively worshippers Christians in the country and it must be noted how significant an understanding of the ecumenical movement and inter church relations are as part of an overall understanding of the role of the Church in English society. As has already been touched upon the reformation in England was far less clear cut than in other northern European countries and for decades the denominational affiliation of the nation fluctuated in line with the allegiance of the monarch. This meant that although there was significant persecution of both Roman Catholics and Dissenters through various periods of ecclesiastical history diversity has never been absent from the national scene even though the Test and Corporation acts put in place in 1673 and 1661 respectively required affiliation to the Church of England of all holders of crown and municipal office, which effectively excluded posts of any influence in the country to free church dissenters and Roman Catholics. The repeal of the Acts in 1828 followed the next year by the Catholic Emancipation Act removed these distinctions and acted as an important marker on the way to a religiously pluralistic society. As John Gay makes clear in his ‘The Geography of Religion in England’ in many areas of England the Church of England has rarely or never been the majority church. In much of Yorkshire for example the Methodist chapel and not the Anglican Church was long the social centre of small communities and Liverpool with its history of Irish immigration has long been an area associated with Roman Catholic sympathies. This combination of geography and history has in the words of the ecumenical body in England, Churches together in England, “conspired to give the churches in England a privileged role in the ecumenical movement.”

The British Council of Churches was first established in 1942 and since then continuing ecumenical discussions have led to close cooperation between the churches. In particular closer unity between the Methodist Church and the Church of England has been a significant issue in recent decades. A motion for unity that was accepted by the Methodist Church was not approved by the General Synod of the Church of England in 1982 and direct discussions were halted for a time shifting the focus to wider issues of inter church cooperation. Anglican – Methodist discussions however resumed as formal conversations during 1997/8 and the two churches are now on a clear path to unity sanctioned by both Methodist conference and the General Synod and set out in the Anglican-Methodist Covenant signed on 1 November 2003. The focus of this covenant, as was that of the Swanwick declaration signed by representatives of Churches in Britain and Ireland in 1987, is on shared life and mission building on and building up local and regional expressions

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73 For further discussion of the issue see Gay 1971.
of unity, rather than a focus on national structural unity. In England today there are now over 2,000 local churches together groups where churches locally cooperate in a variety of worship, study and service related activities and Local Ecumenical Partnerships (LEPs) where churches of different denominations in a particular geographical parish enter into a more formal cooperation sharing buildings, ministers and other resources as well as eucharistic communion and having one church council.75 These bodies are in turn overseen by about 50 intermediate ecumenical bodies bringing churches together over larger geographical areas.76

Nationally local cooperation is mirrored by cooperation over a number of political and moral issues on which the churches wish to speak out. Often this takes place through the work of the Churches Together in England (CTE) or the larger body Churches Together in Britain and Ireland (CTBI). One good recent example of this being the booklet compiled by members of the churches represented by CTBI produced to help Christians explore issues raised by the European elections in June 2004 prior to casting their vote.77 In addition it is not uncommon for church leaders to unite in making statements on public policy, one example of this being the joint statement made by the Archbishop of Canterbury, Dr Rowan Williams and his Roman Catholic counterpart the Archbishop of Westminster, Cardinal Cormac Murphy O’Connor in February 2003 relating to the crisis in Iraq.78 Such initiatives act as evidence of the close cooperation and agreement between the mainstream church bodies. In order to reach a full understanding of the current situation however mention must be made of the cross church bodies that exist uniting members of different denominations who have both their churchmanship and aspects of theological interpretation in common. This is particularly true of representatives of the evangelical tradition who are united through such bodies as the Evangelical Alliance79 and increasingly a greater split in terms both of theology and practice can be seen in England between the mainstream church bodies and representatives of the evangelical tradition than between the various denominations that exist in England.

Faith communities: National policy

A further issue which has impacted on the role played by the Church vis-à-vis government and in the nation as a whole in terms of social policy at the beginning of the 21st century has been the development in interfaith relations in general and the government’s policy with regard to faith communities in particular. The government makes use of the term faith communities to refer to religious groups with which it can consult, through which it hopes to work to develop civil society and which it sees as important partners in reaching into local communities.

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76see Nunn 1995 for further information on this process and its practical implications.
77 Lampard 2004.
79 Evangelical Alliance Website: http://www.eauk.org.
Evidence of the direction of government policy in this regard can be seen in the Home Office document ‘Working Together: Co-operation between Government and Faith Communities.’ Here the report refers to the role of the Churches in relation to other faith communities in the country

The Christian Churches have had an immense historic influence in shaping society, and make significant contributions in a wide range of areas such as community development, education, social inclusion and heritage. For these reasons the Churches have made and continue to make a particular and distinctive contribution to the development and implementation of Government policy in certain areas.

The report continues to note the role that faith communities whose members are “more recently settled in these islands” can make. It is interesting to note that later in the report in laying down guidelines for consultation by government department with faith communities the authors feel the need to note that consultation should not only include minority communities, but should also extend to the Christian Churches who are a ‘crucial constituency.’ The report however goes on to say, in an interesting indication of the official declining influence of the Church of England as counterpart to Government that

While the Church of England is the Established Church in England, it should not be accorded privileged status in such consultations … However, if a decision is taken to canvas the views of the Church of England, for instance on matters with a doctrinal dimension, (e.g. civil partnerships), it would normally be appropriate to approach other prominent Christian traditions.

Organisational and decision making structures of the Church

The parishes of the Church of England are the key units in both its structure and ministry. Because of the Church’s established nature the parishes have pastoral responsibility for all those living within their geographical boundaries, whether or not they are members of the Church. Parishes are run by elected Parochial Church Councils (PCC) who in collaboration with the Priest serving the parish take responsibility for the day to day running of the parish and for the upkeep of the fabric of the Church as well as more long term planning. Particularly important are the two Churchwardens who have a personal legal responsibility for some aspects of the running of the Church. In addition to this elected body some parishes have additional worship, youth, visiting etc committees who take responsibility for particular areas of Church life. PCCs also send representatives to both deanery and diocesan synods and in this way the laity play a role in the governance of the regional and national church. The Deanery is an organisational unit consisting of a number of parishes in a geographical area, often focused on a small town in rural

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80 Home Office Faith Communities Unit February 2004.
81 Home Office Faith Communities Unit February 2004, 7.
82 Home Office Faith Communities Unit February 2004, 24 §2.2.38.
areas, for example. The clergy of the area and two representatives of each PCC sit on the deanery synod and this body aims to coordinate activity in the local area as well as functioning as the electoral body to General Synod, the governing body of the Church of England. Any baptised and confirmed member of the Church of England who is on the electoral role and over the age of 16 is eligible to stand for election as one of the diocesan representatives on General Synod although it is only deanery synod members who are eligible to vote. These lay representatives then join clergy representatives similarly elected by their peers and the Bishops of the Church in making up the General Synod.

A perusal of this structure does not however tell the whole story. In 1999 as part of a wider revision of the synodical structures the Archbishops' council was set up. This body has a brief to "co-ordinate, promote, aid and further the work and mission of the Church of England." The body is made up of 19 members, the two archbishops and 17 other elected and appointed members, along with 7 directors. The task of the Council is to give a sense of direction to the Church nationally and support the Church locally and it does this by working with the General Synod (to which it reports), the House of Bishops, the national boards and councils of the Church, the dioceses and a number of other bodies. In very simple terms it can therefore be said that the Archbishops' Council draws up a strategy (and budget) for the Church which is ratified by the General Synod and interpreted and put into practice by the elected members and staff who serve on the boards and councils under the Archbishops' Council. Such boards are Chaired by a member of the House of Bishops and their other members taken from among the members of General Synod who are nominated and elected to serve on the various boards and councils with specific responsibility for different areas of the work of the Church.

The Church is therefore, we can see, governed by its Synod, but it is led by its Bishops and therefore ultimately by its two Archbishops who have metropolitan authority (that is supervisory authority in defined issues) in the provinces of Canterbury and York respectively. The Archbishop of Canterbury is also Primate of All England and therefore the figurehead of the Church and the nation's senior Christian voice. The two provinces cover the 30 dioceses in the South of the country (Canterbury) and the 14 in the North (York). The 43 dioceses in the Church of England are in turn each led by a Bishop who with the help of assistant bishops, other clergy and lay people is responsible for all those living within his diocesan boundaries. Clergy and lay officers of the Church are licensed by their Bishop for service in a particular parish and it is to their Bishop that they pledge canonical obedience on taking up a post. We can therefore see here the practical outworking of the Anglican ecclesiology of Episcopal succession. Regardless of the details of whether this is interpreted more or less strictly in the Church at present, the

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83 All diocesan Bishops sit on General Synod along with a selection of suffragen bishops, making a total of 54 out of 108 Bishops in total who have a voice on this body.
84 The Archbishops' Council of the Church of England 2000c.
85 44 if the Diocese of Europe is included, which has a Bishop based in Gibraltar and clergy placed in chaplaincies throughout Europe.
Porvoo/Borgå agreement of 1996\(^{86}\) seemingly pointing to the later, the central role that this has played in the ideology of Anglicanism means that the Episcopacy retains a central role in the leadership of the Church both legally and ideologically. The Diocesan Bishop has the power in his diocese to license and ordain and while this frequently occurs in consultation with others it is ultimately his personal decision and responsibility. At national level a number of Bishops make up one of three sections of the General Synod, and this body is referred to as the House of Bishops. (A body which even separate of the General Synod holds considerable power as the college of the Bishops of the Church). In addition to leading the Church, in terms of its individual members chairing committees and boards, the House of Bishops also takes responsibility for developing the position of the Church on pertinent issues of the day. Like the boards and councils of synod who produce reports for ratification by Synod, which until such a time bear only the authority of the board that authored them, the House of Bishops produces reports and occasionally statements which are statements of their common mind on the issue in question and intended as guidelines for the Church.\(^{87}\)

### The Church’s general financial situation

Funding to support the work of the Church of England comes from two main sources, the Church Commissioners and independent giving. The Church Commissioners manage the assets of the National Church, both in terms of land and financial portfolios and have particular responsibility for clergy stipends and pensions. Financial losses in the early 1990’s however forced cut backs in payment to dioceses and this in turn prompted a major review of the entire system. As a result parishes now fund two-thirds of the Church of England’s total expenditure, which amounts to around £850 million per year.\(^{88}\) An in-depth survey of the finances of the Church in October 2000 predicted annual deficits for 36 dioceses during the period 2001–3 with only two dioceses predicting surpluses and the remaining ten breaking even and these figures were taken before the review of the pensions scheme was finalised.\(^{89}\)

### Costs of ministry

Formally most clergy in the Church of England are not employed and in receipt of a salary. Instead they receive a stipend intended to meet living costs (on average £16,910 p.a. in 2001), housing and a non contributory pension on retirement. Clergy pensions in particular have become a significant issue for the Church in

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\(^{86}\) The Porvoo Common Statement 1992.

\(^{87}\) One such example is the report ‘Issues in Human Sexuality’ (1992) which laid down guidelines for the Church concerning homosexuality.

\(^{88}\) Archbishops’ Council 2003b, 10.

\(^{89}\) Archbishops’ Council 2001, 28 §138.
recent years as clergy, following general societal trends, are living longer. These costs have a direct impact on parish finances as dioceses (using funding mainly raised by the parishes) have taken on responsibility for clergy pensions earned from 1998, while the Church Commissioners are funding past service pensions. The changes have meant a transfer of ministry costs of over £80 Million p.a. from the central church to the dioceses. In response to this churchgoers have increased their giving by 52 percent on average and now give on average about 2.8 percent of gross income. This however still needs to increase and General Synod has set a target of 5 percent. Naturally some dioceses remain richer than others however and the principle of mutual support is increasingly implemented to provide support for those dioceses who cannot meet their costs. Centrally costs have been held at 2001 levels for the period 2002–4 meaning the loss of about 50 posts in national Church institutions. About 44 percent of total church expenditure goes in meeting the costs of stipendiary ministry and although clergy numbers are expected to decline these costs are expected to remain a significant element of church expenditure. In 2001 in England as a whole there were 0.17 full time stipendiary clergymen and women per 1000 inhabitants. A figure that reveals that although the funding for such posts is a significant cost for the Church, at almost half its annual expenditure, given the pastoral responsibility of clergy noted above the Church could not function as it does without the work of other categories of church worker, many of whom are not paid for their services.

All dioceses also employ some level of administrative staff and a number of posts at national level are filled by lay workers. Even without taking these into account however parochial stipendiary clergy make up only 32 percent of licensed ministries. Of over 25,000 licensed ministers in the Church of England 9,400 are stipendiary clergy (including 114 Bishops and other dignitaries), around 1100 are Chaplains to the Armed Forces, in prisons, hospitals and the universities. These ministers unlike their colleagues who are stipendiary ministers are employed by the respective institutions that they serve and therefore do not have the same impact on Church finances. 250 are Church Army Evangelists about 100 are stipendiary lay workers and 100 are ordained members of religious communities. Of those who do not receive a stipend for their services 2,000 are non-stipendiary ministers or ordained local ministers and 10,300 are Lay Readers while over 4,800 retired clergy still play an active role in parish ministry. Non stipendiary ministers and ordained local ministers are both categories of ordained ministers in the Church who do not receive financial remuneration for their work. The difference being that

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90 Archbishops' Council 2001, 3.
92 Archbishops' Council 2003b, 10.
94 Archbishops' Council 2003a, 3.
95 figures from 2001.
96 Lay Readers are men and women selected locally and licensed to a particular parish. They are unpaid and following training assist the priest of the parish with worship and pastoral care. They are licensed to preach, teach and conduct services of worship, including funerals.
97 figures from Archbishops' Council 2003a, 10 and Archbishops' Council 2003b, 1.
ordained local ministers are selected locally and licensed to a particular parish. Many such ministers as well as Lay Readers have paid secular employment.

Other expenditure and income

In addition to ministry costs expenditure seen nationally covers the following areas; Worship and buildings 32 percent, Support and Administration 18 percent and the community 6 percent. As has already been mentioned income comes from two main sources, investments and giving. In 2001 this can be broken down as follows; The Church Commissioners Capital 5 percent and investments 14 percent, Investments (other bodies) 10 percent, Tax-efficient giving 27 percent, Other giving and fund-raising 37 percent, legacies 4 percent and fees 3 percent.

Volunteers

As mentioned above a significant percentage of the licensed ministers of the Church do not receive a stipend for their work. In addition to these individuals there are also significant numbers of churchgoers who voluntarily give time to the Church and without whom the Church could not run as it does. At local level the majority of parishes have youth clubs, Sunday schools, choirs and fund-raising events that are dependent on such people. There are however no official figures available that confirm the extent of this, variation is huge across the country and an indication can only be provided by reference to individual surveys. A survey carried out for the Rural Church Project between 1988 and 1990 showed for example that in the 5 rural dioceses studied just under a third of attendees at Anglican Sunday services held some position of responsibility in the parish. In 2002 the Church measured nationally for the first time the numbers of young people (16–25) taking part in non-worship activities connected to the Church and also the numbers of adults working with this age group. Parishes reported 41,000 adult volunteers working with 125,000 11–15 year olds and 37,000 16–25 year olds. One group who have already been mentioned and for which figures do exist are churchwardens, there are approximately 32,000 in the Church of England as a whole and these individuals are of crucial importance to the continued life of the Church shouldering as they do responsibility for the fabric of the Church and, in times of interregnum, for the coordination of the ministry of the parish. The Churchwardens in a parish are supported by a Parochial Church Council (PCC), and all members of this group serve without financial reimbursement. The introduction of lay ministry teams in a number of parishes in recent years has also meant a rise in the number of

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98 figures here refer to financial year 2001 Archbishops’ Council 2003b, 10.
99 Archbishops’ Council 2003b, 10.
100 Davies, Douglas et. al. 1991, 164.
churchgoers who, along side the ordained minister(s) take an active role in the ministry of the parish.

At national level lay members of General Synod are reimbursed for travel and living costs when attending its residential meetings two or three times a year, but give their time for free often including holiday leave. Members are also expected to attend diocesan and deanery synods in their free time too and in addition many members sit on committees and boards of Synod.

The Church in the welfare system: A historical perspective

As has already been mentioned the Poor Laws were the dominating factor in English social policy from 1601 until the formation of the welfare state and within this system the Church played a crucial role. The basic unit of administration was the parish and the Church wardens were charged with the role of poor law guardians which involved keeping track of the poor of the parish and administering that aid to which they were entitled. Following the industrial revolution the situation in the country changed and the system which had been effective in rural parishes was shown to be less effective in the towns. The Victorian reforms of 1834 were pushed through parliament by a number of committed reformers, the majority of whom, such as a Lord Shaftesbury were also known for their Christian faith. These reforms improved sanitation and general conditions in the towns and centred poor relief around the workhouse. Public Welfare provision remained, in other words, minimal and the majority of aid for the poor as well as education continued to be provided by private benefactors and charitable organisations, many of which had connections to the Church and by Missions often set up by clergymen. Much of this charitable support was provided in the Victorian spirit of Paternalism and involved education and the encouragement of self-help so as not to encourage the ‘evil’ of dependency. Not all such philanthropy was provided by men however and a number of wealthier women of this era found a role for themselves in campaigning and social work. One of the best known social campaigners of the day was Josephine Butler (married to an Anglican clergy man and a devout churchgoer herself) who fought for the rights of women and for better social conditions for all. She was more outspoken than many women of that time, but typical of the Anglican lady of her day who threw herself into charitable works spurred on by a mixture of boredom and religious and social conviction. In the majority of cases such undertakings were under the supervision of the Parish priest who remained through his rounds of visiting and baptisms, weddings and funerals at the centre of local society. Such philanthropy is however only one element of the Church’s involvement and influence of the formation of the welfare system in the country. The Church has throughout the whole of modern English history had a role to play in the political life of the nation, as was briefly mentioned above and in this way the

102 See Loades 2001 for a comprehensive account of the life and work of Josephine Butler.
Church both directly and indirectly influenced the formation of the welfare state in the form it took in 1948. Much of this was due to the particular influence of William Temple, leading Churchman and then Archbishop of Canterbury until his death in 1942. Munby has said of Temple that his thought formed the basis of the welfare state and while it is not possible to explore this fully here it is worth mentioning that he has been credited with inventing the term ‘welfare state’ a fact which suggests influence which ceases to be so surprising when it is realised that Temple and Beveridge had not only studied together at Oxford and become close friends, but both during this period as students, encouraged by their tutor, experienced the realities of slum life. The influence of the Church worked informally in this manner through personal contacts, but also formally though the Bishops in the House of Lords who spoke on a wide range of social issues and through the regular contact which the Archbishop still customarily had with the Prime Minister at this time. Temple firmly believed in a Church in the nation, which had a duty to debate social issues and formulate principles which could underpin political policy in a Christian country. Speaking at the Malvern Conference in 1941 Temple said

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\text{it is the duty of Lambeth to remind Westminster that Westminster is responsible to God; but this does not mean that Westminster is responsible to Lambeth.}^{106}
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Temple saw the role of the Church in society as one of mediator and moral guide, while the politicians clearly saw this as their role, however as a representative of the established Church Temple and other church leaders had the opportunity to act and comment on a variety of issues which other religious and community leaders were never given the space to do. By making use of these opportunities the Church was able to influence the formation of the welfare state, albeit minimally, and retain for itself within the framework of this comprehensive welfare system a role as a voice on moral and social issues, legitimate critic of political policy and mouthpiece for the disadvantaged.

Giles Ecclestone has characterised this approach to the Church’s perception of its role in relation to government as one of “Critical Solidarity.” This is a policy which the Church continued throughout the second half of the twentieth century although with varying degrees of criticism and solidarity. Temple and his generation believed that the Church had a right to be heard and shared moral principles with the nation at large, which could underpin policy formed by politicians. His successors have lived and acted in a changed society where that consensus no longer exists, but the continued voice of the Church in national debate shows that the Church still sees it as her duty to speak out on welfare issues. The Church Report ‘Faith in the City’ produced in 1985 in the midst of changes being made to the welfare system by the

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104 Munby 1960.
105 For a detailed discussion of Temple and the development of Anglican Christian Social Theory see Middlemiss, 2002.
106 Temple, William, Malvern Conference, 15.
conservative government highlights both the continuation of the Church’s role as it perceived itself and the changes. The report is explicitly titled as a ‘A call for Action by Church and Nation’ and this clearly shows the Church’s own belief that its place is to make recommendations not just for the Church, but also for the Nation as a whole. Where the report differs however from the approach taken by Temple is in its detailed recommendations for political action. Temple had confined himself and the Church to forming principles and left the detail to the ‘experts,’ the Church of ‘Faith in the City’ however was well aware that it represented one only voice of many in an increasingly secular society. The Church may have a duty to speak out, but in the late twentieth century there was an increasing need, that was recognised within the Church, for her comment to be grounded in a good grasp of the empirical facts. An understanding which came about not least because in this period the lack of a credible political opposition to the strong government meant that the Church increasingly took on the role of government critic.108

The Church in the welfare system: Today

Today the Church continues to act in this vein at a national level. The national church employs a policy advisor on Home office affairs, whose specific brief is to monitor developments and government policy on a wide range of social issues and act as informed advisor on such matters to the Church Leadership. The Church therefore continues to campaign and speak out on a variety of social issues both directly to government in response to consultations and in the national media. Some of the ways that the Church does this and issues it has commented on in the recent past are detailed below. A specific theological stance with regard to the welfare state is however a different matter. In 1986 the Social Policy Committee of the Board for Social Responsibility published a report entitled ‘Not Just for the Poor: Christian Perspectives on the Welfare State.’109 This report is now nearly 20 years old and was written in the same period as Faith in the City, when many of the values underpinning the Welfare State seemed under threat, but its still valid as the stance of the Church in relation to the Welfare State. The report concludes that any system of welfare must be

concerned with the wellbeing of all members of society: the notion of interdependence and concern for the poor and oppressed demands no less...Generous provision of services by society through the state is essential. But it is not enough on its own to produce the kind of society we wish to see. A mixed economy of welfare, built on cooperation between the public, voluntary and private sectors is to be welcomed.110

108 For a fuller discussion of the development of the role of the Church in the political system and a voice on welfare issues see Middlemiss 2002 and Clark 1993.
They go on to say that they affirm the vision, if not the detail of the post war settlement, but are however not arguing for the status quo as weaknesses exist in the system and society is changing. Christians therefore, the report ends, should oppose the introduction of any individualist philosophy into welfare provision and policy, should be concerned about divisions of wealth and opportunity in society, be wary of trends which divide the nation into those who receive benefits and those who do not. The committee that produced the report clearly see a particular role for Christians and the Church in the welfare system.

If the Church were to encourage the building of links and bridges across the barriers that divide our society, Christians would be in a better position to play that role effectively and ensure that ours was a society in which justice and compassion were valued and the interdependence on one another was acknowledged and accepted.111

Speaking more recently giving the Richard Dimbleby Lecture in 2002 the Archbishop of Canterbury also argued for a role for the Church as creator of space for humanity in the midst of deprivation. Religious communities have a role to play in the modern state, according to Williams, if they can offer their vision not in an attempt to gain social control, but rather as a way of opening up some of the ‘depths of human choices.’ So he argues the role for the Church of England is one of making space available.

Its history, its constitutional position – however controversial that may have become for some – means that it is obliged just to be there speaking a certain language, telling a certain story, witnessing to certain non-negotiable things about humanity and about the context in which humanity lives.112

The involvement of religious groups as partners for government in regeneration is then, for him, not a way for politicians to shirk their responsibilities by giving essential work to private agencies to do, but rather the provision of a neutral voice which can draw groups together and help find common priorities. The survival of the ‘public sphere’ as a realm where political argument about vision and education can take place depends, according to the Archbishop, on religion being taken more seriously.113

The focus in this paper on the national role of the church has, of necessity concentrated on the contributions which the Church makes at a national level, which are primarily political and social pronouncements and decisions. It must however not be forgotten that many of these pronouncements come from and are fed back to a Church which remains firmly rooted in the geographical parish system. Much of the work that the Church of England does in terms of welfare takes place at this local level and is therefore difficult if not impossible to mirror in a comprehensive document such as this given the contextual nature of such work and not infrequently the lack of evidence of the existence of local initiatives. The

111 Social Policy Committee of the Board for Social Responsibility 1986, 137.
fact that much work carried out by parishes in the Church of England is done by volunteers means that in many areas small initiatives may not even be known to the parish priest as the individuals who have made the contribution do not consider it appropriate/ necessary or relevant to inform others of their efforts. It will be the job of the case study of Darlington in the North East of England currently underway to highlight such initiatives as well as the types of larger, but still local, welfare initiatives which take place under the auspices of the Church.

The Church on social/ethical issues

The Church of England frequently responds to consultation documents and reports/ legislation from Government. This is done via official responses from the Archbishop’s Council or Boards of the General Synod or in comments in the Press by Board members or individual Bishops. In addition the General Synod, through its boards and councils publishes reports on issues of particular concern to the Church as does the House of Bishops and individual Bishops, in particular those senior Bishops with seats in the House of Lords, make statements relating to public policy in speeches and sermons. The broad nature of this approach and the impact which personal interest has means that it is impossible to discern a ‘church line’ from such pronouncements as can be obtained. The fact that the Church is asked to and actively responds to Government policy consultations is however interesting and some issues on which the Church has submitted official comments or commented publicly on over the past couple of years are Civil Partnership, Charities and charitable status, Drugs Policy, Employment regulations and Asylum, Immigration and Citizenship.

The Church’s response to the consultation document on civil marriage are of particular interest as regards the Church’s official position on ethical issues. In this document the Archbishop’s Council reiterated the Church’s position that marriage between a man and a woman is central to ‘the stability and health of human society’ and is the best context within which to raise children. Here the Church shows its position as the established Church of the land as it claims the above reasons for according marriage a ‘special position within the social and legislative framework of our society.’ The Church however also highlights the importance it places on social justice and human rights stating that:

As a result the Church has on occasions, taken a positive view of particular legislative changes where there has been a need to remedy injustices in our diverse society, even where the result may have been to facilitate developments about which the Church has had particular concerns given its doctrine and teaching. An example would be the law relating to divorce.119

This document also makes reference to the Church’s internal debate, both national and international on the issue of sexually active relationships between gay and lesbian people in committed partnerships which has had an impact outside of the Church too. The General Synod debated, in February 2004 a study guide120 to the statement made in 1991 by the House of Bishops ‘Issues in Human Sexuality.’121 This statement is at present the most authoritative Church of England position on the issue and the decision by the General Synod to commend the recent book for study in the Church was widely seen as an affirmation of that position. The issue is too complex to handle here, but in short the practical implications of the Church’s stance are a policy against blessing gay relationships or ordaining people in same sex relationships.122

At the same sitting in February 2004 the Synod also unanimously passed a motion relating to the recent successes of the far right wing British National Party in local elections in Lancashire. The motion here shows the combination of the theological criticism of racism combined with an understanding of the Church’s duty as a national church to speak for the whole nation.

That this Synod, noting the recent successes of the British National Party in local elections in parts of Lancashire:
Believe that any political movement which seeks to divide our communities on the basis of ethnicity is an affront to the nature of God revealed in creation and in scripture and is a grave danger to harmonious community relationships; consequently voting for and/or supporting a political party that offers racist policies is incompatible with Christian discipleship;
Call on all Christians in England to nurture a loathing of the sin of racism and to model the teaching of Christ in loving all our neighbours; and
Commit the Church of England to work in partnership with our ecumenical partners, other faith groups, voluntary and statutory organisations, mainstream political parties and all people of goodwill in building cohesive communities and in affirming our multi ethnic, culturally and religiously diverse society.123


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A further example of the Church contributing to public debate on social issues is the report ‘Development matters: Christian perspectives on globalisation’ published by the Board for Social Responsibility (BSR) and presented to General Synod in 2001\textsuperscript{124}. This report, unlike the report of a traditional working party, was the result of cooperation with Christian Aid, CAFOD and other mission agencies active in development. The contributions are therefore the views of individual contributors, not the common mind of a committee and as such it is authorised by the BSR as a ‘contribution to debate.’ The debate that followed in General Synod was however not untypical in both the concern for social justice that was expressed and the calls from members for the need both to debate the issue within the church and encourage both further reflection and practical action and to put pressure on government. This focus on these two ways forward is typical of the commentary offered by General Synod on social and ethical issues in current debate. The motion that was passed by synod following the presentation of the above mentioned report and subsequent debate was:

That this Synod
commend Development Matters to diocesan synods and to the wider Church for further study;
Call for Global political and economic action as set out in Global View 2001, with a view to strengthening the position of the world’s poor;
Encourage the Church to practise justice in the distribution of its investments and resources;
Recognise that current trading relations and lending practices have exacerbated the acute economic and social problems facing developing countries and therefore (i) urge her Majesty’s Government to give priority in trade negotiations to the needs of the poorest communities and (ii) encourage discussion with business about the wider social contract and corporate responsibility of companies in pursuit of the common good;
Urge that Export Credit Guarantees are only provided for sustainable projects which do not add further unpayable debt to already indebted countries; and
Ask that education and health for the poorest should be priorities in any development agenda.\textsuperscript{125}

A further example of the ways in which the Church speaks out on social and ethical issues is through its Bishops and Archbishops. In the summer of 2004, for example, the Archbishops wrote to the Prime Minister on behalf of the bishops of the Church of England setting out their views on issues relating to the situation in Iraq and the Middle East.\textsuperscript{126} This received particular media attention given the fact that it is rare

\textsuperscript{124} Reed (ed.) 2001.
\textsuperscript{126} Statement on bishop’s letter to the Prime Minister – 30/06/2004.
for the bishops to speak so publicly as a united voice. However the Archbishop of Canterbury in particular is a figure whose comments are not irregularly the subjects of newspaper and news reports. A sermon made by the Archbishop on Tuesday 20th April 2004 was for example the subject of a news article on the BBC news website the following day. The Archbishop had preached a sermon on Christian obedience, but referring to the need for credible truth in public life, the circumstances of the war in Iraq and the failure to find weapons of mass destruction noted that “we face a general weakening of trust in the political system.” This sermon was a subtle, if open critique of government, yet delivered as a sermon with a distinct theological message. The Archbishop’s criticism of the war was not unexpected since he had offered clear and direct opposition from the outset, along with many other representatives of the Church. The details of the entire debate cannot be included here as the contributions were many and complex, but such a clear line from the Archbishop on the question in opposition to the government was powerful, in that it attracted media and government attention in a way no other religious figure could. For this reason as well as the fact that the Archbishop of Canterbury is the spiritual figurehead of the Church his views and statements on moral and ethical issues demand attention as statements from the Church.

**Liturgy and contributions in the welfare sector**

As with almost all areas of the theology and ministry of the Church of England there is no one official position on the relationship of its liturgy to its contributions within the welfare sector and as always the differences in churchmanship that exist within the church lead to differences in liturgical approaches. However the issue has been touched on by theologians and practitioners writing in an official capacity and in particular an officially sanctioned approach can be discerned in discussions of urban theology which followed the Faith in the City report. The Archbishop of Canterbury’s Urban Theology Group, a group of academic theologians and practitioners ministering in the inner cities, which worked with such questions from 1990. One of the fruits of their work was a volume of essays and reflections entitled ‘God in the City.’ In his introduction the editor, Peter Sedgwick points to the need for honesty in urban theology, in accepting that things are getting worse, but he stresses, this is a need for realism not pessimism. This urban theology, he argues points to the necessity of praise and transformation. In the ‘sense of place’ which is so dominant in urban life there can also be a sense of belonging, of community and of dignity … The central reality of prayer turns realism away from pessimism.128

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127 Rowan Williams, Archbishop of Canterbury ‘John Mere’s Commemoration Sermon’ St Benet’s Church, Cambridge, Tuesday 20 April 2004. (2 Cor. 10.5).

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This brief comment is supported by an article in the same volume entitled ‘Praise.’ The Church has, the authors argue, a vocation to be a ‘sanctuary of transformation’ where there is a different time scale structured by the Church week or year and where participation in the stories, rituals and songs of the Church can change people’s ways of perceiving and living their reality.129 It is, they argue, also vital that the Church relate its worship to the situations in Urban Priority Areas (UPAs) and other similarly deprived situations. They argue that it is not enough for the rest of society and churches in more comfortable situations to be concerned and send aid, rather genuine worship in the UPA church is of fundamental importance both for those who live there and for the Church and society as a whole.130

Worship then is a central part of the social work of the Church. They conclude

It seems a strangely weak gesture ‘just’ to worship. What are we doing every Sunday, every day as we ‘waste’ time on this? We are resisting the most dangerous of temptations – to turn stones into bread, manipulate the world to suit ourselves, dazzle with successful gestures – in favour of a message that says to love God with all we have and are, and to worship God alone. And when we do that in the extreme situations of the UPA there is a sign of faith, hope and love that is desperately needed elsewhere too.131

Here therefore we can discern two distinct threads which are present in other contemporary official statements of the Church’s position on the role of liturgy, namely that it should be contextual and relate to the everyday lives and language of individuals, but also that it should be the liturgy of the Whole Church not merely of the immediate worshipping community.

The preface to Common Worship, officially authorised liturgy of the Church of England since 2000, affirms the need to recognise the multiplicity of contexts in which worship is offered132 whilst placing this diversity within an ‘ordered structure which affirms our essential unity and common life.’133 This is further emphasised in the introduction to the volume of Pastoral Services. Here the image is used of the Church as a body of people on the move, individuals are all at different stages of the journey, but the services of the Church are an opportunity for people to put that journey in the context of the Church. For this reason the liturgy of the Church needs in-built flexibility to adapt to varied pastoral situations while also reflecting the ‘dependability, consistency and stability which is implied by the long history of the Church’s worship, tradition and buildings.’134 Here an understanding of the Church of England as the Church of the Nation and not just for the regularly worshipping

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130 Ford and McFadyen 1995, 103.
131 Ford and McFadyen 1995, 104.
132 Similarly the officially authorised Patterns for Worship (New Patterns for Worship, Church House Publishing for the Archbishops’ Council, London, 2002) is an attempt to assist and advise worship leaders on ways to present and adapt liturgy to suit the local context.
133 Archbishops’ Council 2000a, ix.
134 Archbishops’ Council 2000b, 3.
community is implicit and it is therefore seen as a part of the pastoral responsibility of the Church to provide company on life’s journey\(^\text{135}\) and so worship that ‘not only strengthens Christians for witness and service, but which is itself a forum in which Christ is made known.’\(^\text{136}\) The structure and not just content of the worship is therefore seen to be important for both the witness and service of the Church moving from the gathering of the community through the Liturgy of the Word to an opportunity of transformation, sacramental or non-sacramental, after which those present are sent out to put their faith into practice.\(^\text{137}\)

In an essay, which has the authority of the Liturgical Commission of the Church John Gladwin sets out the place of the liturgy of the Church in its social context. Taking his starting point as the Book of Common Prayer (from 1662), still the only permanently authorised provision for public worship in the Church of England.\(^\text{138}\) The prayer book is, he argues committed to the concept of a national Church and the idea that the nation accepts itself as a Christian Nation so that the Church of England is the Church of all the people of the nation and not a gathered congregation set apart from the community. It is also committed to the supremacy of the Crown and its unifying role and therefore recognises its role as trustee of the gospel in the nation and body responsible for its spiritual welfare. With this in mind therefore he argues for a Liturgy which expresses the duty of the Church to provide worship, education, pastoral care and compassionate action for all. It should include prayers for Government and citizenship, war and peace, leisure and work, poverty and plenty. It should affirm the concept of political power and support the institutions of the land, although not unconditionally and thirdly emphasise an understanding of the establishment of the Church not as a role which gives privilege, but rather as an emphasis of the Christian inheritance of the nation. So Liturgy of the Church of England should be able to

embrace a wide range of people … People of other faiths and of none ought not to be embarrassed by the worship of the Church. There are important occasions when people from many backgrounds will be present: occasional offices, civic occasions and community based events. The presentation and experience of Christian worship can serve to draw into its heart the spiritual longings of many … [It] can impart the challenge and the welcome of the Gospel without undermining the integrity of those who do not call themselves Christians.\(^\text{139}\)

In a similar vein Michael Perham, a member of the Liturgical Commission, argues in a commentary on popular festivals that people respond to the Church when what it is doing relates to their lives and community. This may involve using existing

\(^{135}\) Archbishops’ Council 2000b, 6.  
\(^{136}\) Archbishops’ Council 2000a, x.  
\(^{137}\) Archbishops’ Council 2000a, x.  
\(^{138}\) Archbishops’ Council 2000a, ix.  
\(^{139}\) Gladwin 1993.
festivals to affirm existing communities or the creation of new one to help create a sense of identity and community. For

unless the Church of England wishes to follow the way of a sect, it must be constantly on the look out for occasions for ministering to the whole parish, and that must include the institutions in it and the places where its people work. Some will protest that their parish is not like that, for a commuter parish has no institutions except schools, and everybody works elsewhere. But it is precisely in those parishes that a sense of corporate identity and community most needs to be developed by the Church, for there are few other bodies to do it. If that is the minstry the Church is to exercise liturgy will surely be an important part of it.140

Situation and policies regarding gender

While in general terms English society aspires to gender equality and huge advances have been made by women who have taken places at the top levels of industry, the judiciary and government fundamental inequalities remain in the system many of which are linked to issues of the woman’s place in the family and the combination of child care with career progression. Women are, for example, on average paid less than their male colleagues and professional women are less likely to reach the top ranks of their chosen field. Women also spend more time than men doing household chores. An average of 2 hours and 30 minutes per day compared to the hour dedicated by the average man to such tasks daily.141 This situation is perpetuated by a combination of a continuation of belief in ‘traditional family values’ by a large sector of the population along with in built bias in some systems. Maternity leave for example is still available exclusively to the mother.

Legislation promoting equality

There are two pieces of legislation in Great Britain which make provision for discrimination on the grounds of sex. These are the Sex Discrimination Act 1975 (SDA) and the Equal Pay Act 1970. Both acts apply to men and women of any age (including children). The Sex Discrimination Act makes sex discrimination (both direct and indirect) unlawful in employment, education and the provision and sale of goods, facilities, services and premises. It is also unlawful to discriminate against someone because they are married, to victimise someone for making allegations or bringing a case under the act and to publish discriminatory advertisements. There are a few exceptions to the act, most importantly, positive action allowing positive discrimination in work or training where members of the relevant sex are under represented in a particular field and discrimination by non-profit making bodies in restricting membership to one sex or providing benefits to one sex in line with their

140 Perham 1984.
main objective. One such example is the amendment to the Act which came into force in February 2002 allowing political parties to apply positive discrimination when selecting candidates in order to reduce inequalities in the numbers of male and female candidates standing for election. This amendment came about following the General election of 1997 as during the campaign the Labour Party had been forced to withdraw a policy of women only shortlists in some areas following an employment tribunal where it was found to be in breach of the Sex Discrimination Act. Nonetheless the General Election of 1997 resulted in the highest ever number of women Members of Parliament (MP). 118 were elected in June 2001, two less than in 1997. 26 of them have ministerial posts and together they represent 18 percent of the total number of MPs.

The Equal Pay Act gives an individual the right to the same pay and benefits as a person of the opposite sex in the same employment, where the individuals are doing like work or work of equal value. An employer does however not have to provide the same pay and benefits if it can prove that the differences are due to a reason other than the sex of the person(s) involved. Both of these laws are monitored by the Equal Opportunities Commission which was set up under the SDA. The Equal Opportunities Commission is a statutory, independent body which works to promote equality and remove discrimination between the sexes. Despite the fact that this legislation has been in place for over three decades however there is little or no evidence of a narrowing of the pay gap. A report by Payfinder.com dated 1 June 2004 showed the average pay gap at 24 percent, a figure higher than that given by the Office for National Statistics of 19 percent. According to Payfinder the gender pay gap has also widened by 5 percent over the 12 months preceding the report.

**Taxation and social entitlements**

Parental leave is based on individual rights. New regulations which apply to all those whose child was due, or due to be adopted, on or after 6 April 2003 lengthen periods of parental leave and extend the rights of working parents to apply for flexible working hours. The Government’s intention, in line with other benefits policy, being to facilitate the combination of work and family responsibilities, allowing as many people of working age as possible to enter and remain in the labour market. Paid maternity leave is now 26 weeks with the option of an additional 26 weeks of unpaid leave if desired. (where the woman has worked for 26 weeks or more before 14th week of pregnancy) These rights are governed by laws relating to the woman’s employment although unemployed women are entitled to basic maternity pay from the state. 2 weeks paid paternity leave are now

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143 Women in the House of Commons, 2003, 2.
145 The report is available at [https://secure.payfinder.com/04_06_01_PF_Anniversary.pdf](https://secure.payfinder.com/04_06_01_PF_Anniversary.pdf).
available to fathers and rights akin to those of natural parents have been introduced for adoptive couples (or individuals) where one partner is entitled to the equivalent of maternity leave and the other to 2 weeks paid leave. In addition all employees have the right to 13 weeks unpaid parental leave for care of children to be used until the child’s fifth birthday (extensions to these entitlements are available for the parents of disabled children).

The introduction of paternity leave marks a major change in UK policy. Katherine Rake, writing before the introduction of these new measures commented on the consistent lack of policies in the UK designed to increase men’s participation in caring. While this has now been addressed to a certain extent, much of what Rake was saying following the Labour Government’s first term in office remains true. The statements which it made in 1998 concerning families remain true of its policies at the present time, singling out marriages as the ‘most reliable framework for raising children’. There is Rake argues an implicit gender bias built into the current policy framework as the focus on paid employment as the basis for citizenship “increases the opportunity costs and income risks attached to caring work and sustains the long-standing under valuation of unpaid caring work.”

Pensions are also based on individual rights. Currently the pensions system is based on the payment of national insurance contributions throughout working life, the amount of basic state pension received on retirement will depend on the number of years the individual has contributed to National Insurance. In addition to this basic rate contributions can be made to the additional state pension, an occupational pension scheme or a personal pension scheme. The terms of these vary, but often there is no automatic right of inheritance for a spouse and the additional state pension, for example, limits inheritance to a maximum of 50 percent.

In contrast tax credit available to families with children, ‘Child Tax Credit,’ while means tested is allocated to families rather than individuals and the amount received is allocated according to total household income and number of children.

**Gender equality policy**

The recent changes to parental leave rights are part of the Government’s wider ‘Welfare to Work’ policy mentioned above. Within this policy is an explicit emphasis on encouraging women of working age into the labour market. It is therefore unsurprising that the Minister for Women in the Cabinet, Patricia Hewitt, is also the Trade and Industry Secretary. She and the Deputy Minister for women are supported by the ‘Women and Equality Unit’ (WEU), which is a part of the Department for Trade and Industry and have a remit to promote and realise the benefits of diversity in the economy and more widely and to develop policies

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146 Rake 2001, 224.
149 www.taxcredits.inlandrevenue.gov.uk.
relating to gender equality and ensure that work on equality across Government as a whole is co-ordinated. According to the website of the WEU

The Government believes in a modern Britain: That fosters and uses the talents of all; That promotes opportunity for everyone, and; That views diversity as a source of competitive advantage and higher productivity.

Equality for women is then, in the vision of the Government, a catalyst to economic growth and many of the issues which the WEU works with on behalf of government relate to the position of the women in the workplace, although not exclusively so. The Unit works with a variety of issues which give not only a good indication of policy but also the areas prominent in public debate. In the workplace the government has a commitment to reduce the pay gap which still exists between men and women and to work with business to address the fact that women are still a in minority in the boardroom. In families the government has a commitment to provide accessible affordable childcare and to help working families to improve the work-life balance, this includes policies for flexible working and parental leave as well as tax credit and investment in childcare facilities. Although currently there is a severe lack of formal childcare available in the country. In terms of society in general the government’s equality policy includes working to introduce legislation for civil partnerships for same sex relationships, to this end the Civil Partnership bill was introduced on 31 March 2004 and it now awaits parliamentary time for debate, having already sparked much debate in the country at large.

The unit is also leading a gender equality steering group across Government to co-ordinate equality and to embrace best practice in promoting diversity in policies and services as part of a process of ‘mainstreaming’ equality policy and strengthening the separate institutions which have worked with these issues, by bringing them into the mainstream of public policy. Finally a practical issue, which the unit is actively working with and which has also been prominent in public debate, is the question of domestic violence. New legislation covering this area was introduced in December 2003, the most significant alteration of the domestic violence legislation for 30 years. In addition the WEU is due to publish the first ever national study into the social and economic costs of domestic violence in the spring of 2004. The study has already shown that two women a week are killed by a partner or former partner in Britain every week. Publicity of this issue along with new legislation has brought the general issue of violence against women into public debate. Recent high profile cases of forced marriage and subsequent policy reactions with renewed guidelines for police and officials in foreign embassies have also contributed to the overall debate. This issue is a recent example of the close

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150 Clasen 2003, 576.
151 Full text of the Bill can be found at http://www.publications.parliament.uk/pa/ld200304/ldbills/053/2004053.htm.
152 Information on the WEU and its work can be found at http://www.womenandequalityunit.gov.uk/about/toc.htm.
153 Interim findings of the report are available at http://www.womenandequalityunit.gov.uk/domestic_violence/ interim_findings.htm.
154 Foreign and Commonwealth Office – Launch of Social Services Guidelines on Forced Marriage (31/03/04)

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connections in England between welfare and immigration policy, which have traditionally and continue to impact on one another. In terms of government policy this can be seen in the close connection between gender equality and policy to reduce racial, sexual and religious discrimination. The WEU has a wide remit which includes promoting equality between all in society. In more specific terms this connection can be seen in the special attention paid by the unit to minority ethnic women. These women are less likely to be in paid employment than their white peers and more likely to be surviving on benefits. 155

Gender issues in public debate on welfare

The discussion above highlighted issues prioritised by the government in terms of gender equality. These are all issues high on the public agenda, but also compatible with the government’s prioritising of gender issues which can be connected to policy promoting economic growth. The following are also issues which have taken up a significant amount of column inches in recent months or are a focus for academic research.

Women live longer than men but are also more likely to have more years of ill health. 156 Outliving their partners they are therefore also more likely to spend time living in a residential care or nursing home than their male counterparts. 157 This has an impact on the way the care of the elderly is profiled in public debate, as issues that particularly effect women are therefore prominent. One such issue connected both to issues of the elderly and changes in families is the debate over pensions, if women live longer in a system where the philosophy is still based on a male breadwinner supporting the family both in work and later through a pension women suffer years of poverty following the death of a husband or as the outcome of a divorce which leaves them with little claim on their husbands pension (although the later has been recently affected by changes to the divorce law allowing the courts greater powers to split pensions as they see fit in such cases, this has had little effect to date).

Also as more and more women now choose to work, government policy reflects this expecting them to work in order to earn a pension. Public debate correspondingly takes up issues of the responsibility of the individual to save towards their pension. The issue of pensions is also closely connected to another prominent issue in public debate, namely the close relationship between gender and poverty in Britain. The report Gender and Poverty in Britain 158 demonstrates that women are more likely than men to be living in poverty. This is underpinned by the assumption that still prevails in the system that women have access to a male partner’s income. Lone parents, divorcees and retired women are therefore all more at risk of poverty than their male counterparts. Women frequently gain care of their children follow-

156 Summerfield and Babb 2004, 106.
158 Bradshaw et al., 2004.
ing a divorce or never have the support of the child’s father. Many fathers do not pay maintenance to their children, even when this has been demanded by the courts and lone mothers are as a result of this and other connecting factors statistically the group most likely to end up living in poverty. Politically this sparks debate as to the workings of the benefits system in such cases, while both academics and politicians debate the relative merits of benefits as opposed to incentives to work.

In low income households women’s traditional role as managers of the household income means that many women with male partners are more likely to go without to provide for their children and to bear the brunt of the stress of budgeting and there is therefore also an issue of hidden female poverty.\(^\text{159}\)

**Women and men in the welfare sector**

The roles of women and men in the welfare sector differ both in terms of employees in the public sector and welfare work that is carried out in the home. Data from the General Household survey, which collected data on the extent and nature of care giving in Britain in 2000 shows that 16 percent of those aged 16 and over in Britain were caring for a sick, disabled or elderly person\(^\text{160}\) and 28 percent of these spent over 20 hours per week on such responsibilities.\(^\text{161}\) While both men and women of all ages provide care to individuals both within and outside their own household women are more likely than men to be carers (18 percent compared with 14 percent) and while there are no differences in the numbers who care for someone in their own household women predominate as carers for individuals who do not share their household (12 percent compared with 9 percent).\(^\text{162}\) Women are also numerically dominant in the sub groups with the largest commitments. 5 percent of women spend 20 hours or more on caring tasks compared with 3 percent of men and 11 percent are the main carer for an individual compared with 7 percent of men.\(^\text{163}\)

Gender differences can also be detected in the types of caring work carried out by women and men. Women are more likely than men to provide care in the form of personal care, keeping an eye on the person cared for and keeping them company while figures for men and women providing physical and other forms of practical help are virtually equal.\(^\text{164}\) These figures charting the work of unpaid carers are particularly important as indicators of gender roles in the welfare sector when it is realised that 59 percent of those being cared for in this way do not receive visits from health social and voluntary services.\(^\text{165}\)

\(^\text{159}\) Bradshaw et al. 2003.
\(^\text{160}\) Mahler and Green 2002, x.
\(^\text{161}\) Mahler and Green 2002, xi.
\(^\text{162}\) Mahler and Green 2002, x.
\(^\text{163}\) Mahler and Green 2002, 2.
\(^\text{165}\) Mahler and Green 2002, xi.
In addition to these figures statistics from the labour force (2003) and UK time use (2000) surveys show that women spend more time caring for their children than men, a figure that holds even when comparing full time workers (women who work spend on average 41/2 hours with their children on a weekday compared with 31/2 for men in the same situation). The age of the youngest child clearly affects the mother’s role in the labour market 68 percent of working age women with dependent children are active in the labour market (this figure sinks to 55 percent for those with children under the age of 5). While 96 percent of their male counterparts are active in the labour market regardless of the age of the youngest child. Men in this situation are, in fact, more likely than those without children to be working while the opposite is true for women although numbers of women economically inactive because they are at home with children is lower than it was.

Women are also in the majority as regards workers in the public sector (welfare and education) both in relation to men, but also in relation to numbers of women in work and black and ethnic minority women are even more likely than their white peers to work in this sector.

Labour market statistics also show a marked difference between men and women as regards paid employment in the welfare sector. Of a total of 29,721,000 workforce jobs in 2003 7,165,000 were in public administration, health and education and women held 4,924,000 of these (compared with 2,241,000 men) and not only do women dominate numerically in this sector as these figures show as there are less women in the workforce than men these figures represent 35 percent of all women in workforce jobs in 2003 while the equivalent figure for men is only 14 percent. In addition detailed statistics from the Health Service corroborate this general trend which highlights some significant differences between men and women as regards the type of work carried out. Of whole time equivalent (wte) staff working in council social services departments for example 81 percent are female. Women also represent 73 percent of all central and strategic staff, but interestingly within that figure a breakdown by activity shows that 81 percent of those providing wte clerical and administrative support were female compared to only 45 percent of all senior directing staff. Women are also statistically much more likely to be working with young children or the elderly and mentally infirm than their male counterparts. Despite the numerical dominance of women in employed by social services however 59 percent of them work part time compared to 25 percent of men. Statistics from the Department of Health detailing medical and non medical staff paint a similar picture. Women make up 81.8 percent of all non medical staff in NHS hospitals and community health services but only 58.2 percent of all

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Note workforce jobs = sum of employee jobs (from employer surveys), self employment (from LFS), HM Forces and government funded trainees.

administrative managers within this field. While women dominate numerically in non-medical posts however of 74,965 hospital medical staff in England only 26,466 are female and only 6,667 have risen to the position of consultant compared to 20,620 of their male counterparts. Within the ranks of medical professionals too differences exist as regards nature of contract 22.1 percent of female medics held part time posts compared with 10 percent of their male peers.

The Church, gender and welfare

What is interesting here is not what the Church has said on this issue, but the fact that it has said very little on gender at all. A recent report of the Doctrine Commission Being human makes only passing reference to the gender issue despite the fact that it explicitly addresses the themes of Power, Sex, Money and Time. In considering the issue of Power the commission notes the historical distortion of this concept by patriarchal society and following a short reflection on the possible biological or social constructions of separate male and female identities makes the comment that

... it hardly seems plausible to rank the male viewpoint above the female, or visa versa. If the way men and women conceive their identities is genuinely different, then those differences require equal emphasis and valuation.

But the commission’s reference to the feminist theological tradition is cautious. Following a commentary on a couple of biblical passages the commission comments

There is undeniably an important point in alertness to male bias in religious traditions written and largely (though not exclusively) interpreted by men, but strands of the tradition do not match so generalized a criticism.

This said the commission are prepared to criticise aspects of the Christian tradition with regard to teaching on sexuality.

For some time now, the majority of Christians have taken a much more positive view than some of the early Church Fathers of the embodied nature of human existence and would repudiate negative views about women. Indeed, the historical inheritance of the Church on sexuality is very ambivalent and there are strands in it that now seem profoundly mistaken. Some contemporary changes are very much to be welcomed, especially the growing liberation of female sexuality.
In their discussion of marriage and sexual union they reject a hierarchical or proprietary construction of marriage, which they note has sometimes been read into the Genesis tradition. They emphasise rather mutuality. In general in this document the commission places great emphasis on the value of human relationships. We are, they write, made in the image of a God of love, whose being is a ‘communion of love’ and so our identity as human beings is never as isolated individuals. Referring to the nineteenth century Anglican theologian F. D. Maurice they continue

the fundamental relationships of human life, parents and children, brothers and sisters, husbands and wives, are the place where we learn the meaning of love and the disciplines of relatedness that enable us to grow in the wider context of our belonging together in human society in a world-wide community of nations.\(^{174}\)

In light of this it can be seen that the commission’s condemnation of the commercial exploitation of sex and sexual abuse comes from the same theological foundation as their criticism of adultery and casual sexual relationships and advice in the face of failed relationships.\(^{175}\)

Where the Church has not been outspoken on Gender issues it has however addressed the role of the family in Church and society and has considered both gender issues and government policy relating to the family within the report ‘Something to Celebrate: Valuing Families in Church and Society.’\(^{176}\) Before making a number of specific policy recommendations to government on issues of housing, social security, health, children and crime the report looks at the role of the Church in advising on family life recognising

a constant tension in the Church between the desire for a firm moral line, and the wish to care for people and offer them fresh starts in the messy, complex situations of actual life.\(^{177}\)

Accordingly the report’s recommendations to the Church focus on pastoral care and support for the family. In the body of the report the working party assesses the history of the Anglican theology of the family as well as number of issues central to family life. In its discussion of authority and roles the report notes

The Church in particular, and society in general can no longer tolerate a sexual division of labour which marginalises women and disenfranchises them from public life … The Church must also attend better to the needs of men, helping them to find new ways of expressing a masculinity that is strong without being domineering … What is needed is a re-evaluation of the contributions of men and women to our common life, not on the basis of gender differences reinforced by assumptions about the separation of the public domain form the private, but on the basis of considerations of justice and the building of the common good.\(^{178}\)

\(^{174}\) Doctrine Commission 2003,131.
\(^{175}\) Doctrine Commission 2003, 92f.
\(^{176}\) Board for Social Responsibility 1995.
\(^{177}\) Board for Social Responsibility 1995, 27.
\(^{178}\) Board for Social Responsibility 1995, 93.
Women in the Church

Concern for developing a theology of masculinity and at the local level attracting men into the church has become an increasing concern for the church in recent years. Concern is no doubt due to the significant under representation of men as regular worshippers although the predominance of women at the ground roots of church activity is not a new phenomenon. Callum Brown’s theory of secularisation, which places the de-Christianisation of British society as a process which dramatically accelerated in the late 1960s in direct relation to several factors in the modernisation of society including the changing roles of women, is by no means uncontested, but whether or not the hypothesis holds his study reveals important evidence of the place of the wife and mother in British society in past generations as preservers of the Christian discourse. Brown’s study is important in this respect in that so little research exists which addresses the role women have played in the life of the church and much that has been written on the subject in recent years has related specifically to the issue of the ordination of women. Since the mid 1800s however the role of lay women in the church has gradually expanded and women have frequently filled functions distinctive and explicitly connected in theological terms by the church to their gender.

The Victorian era was, as previously mentioned, an age of middleclass philanthropy where women found a role as pastoral assistant to the male clergy of the parish and where female religious orders began to flourish again after many years of absence following their dispersal at the time of the reformation. This was a period where the doctrine of subordination was preached from many a pulpit and was accepted as the norm even by many of those women who nonetheless sought a role for themselves and so women’s work in the church was overseen by the parish priest or, in the case of religious orders, by the Bishop of the diocese. The pastoral work performed by these women was frequently caring and the bounds of subordination proved to be flexible in that it seemed natural to many for women to extend their domestic talents and responsibility to a larger sphere in the service of the church as carers of the sick, teachers of children and similar tasks. Women put to the service of the wider community that motherly talent which it was believed came naturally to women as well as her natural female piety which religious instinct, strangely enough in the male dominated church, was seen to be a particular female asset.\textsuperscript{179} This trend of philanthropic work developed by the end of the century in some areas into a more professional role with district visitors\textsuperscript{180} and in some areas Deaconess orders following the Lutheran model.\textsuperscript{181} As Heeney notes however this approach towards the clerical professional role from the pastoral side was the only one in the Victorian era. Preaching and leading worship was not seen as a suitable role for women.\textsuperscript{182}

\textsuperscript{179} Heeney 1988, 13–14.
\textsuperscript{180} Heeney 1988, 46.
\textsuperscript{181} Heeney 1988, 70.
\textsuperscript{182} Heeney 1988, 79.
Despite one or two brave examples and the changes to the perceived role of women that came about as a result of the tasks taken on by women during the First World War, that they were then reluctant to relinquish in peacetime, the perception of women’s work as primarily domestic and in a different sphere from that of men persisted well into the twentieth century. As regards lay participation however the church, as society at large, was affected by movements for electoral rights for women. As early as 1897 Bishops in the Canterbury Convocation (with responsibility for the south of the country) in voting on measures to encourage the formation of elected Parochial Church Councils (PCCs) only narrowly voted against excluding the stipulation male in the regulations for those eligible to be nominated. The debate surrounding this reveals that many churchwardens, who would receive ex officio posts on such councils, were women at the time raising the question of why to exclude women from achieving the same post by election. An incident which provides evidence of a movement in the understanding of women’s role and also of the active role which women were playing in church life at a parish level. It was however not until 1914 that women won the franchise to vote in national elections for lay representatives and the right to stand for election to PCCs. Two of the objections voiced at the time clearly illustrate the two aspects of opposition to a role for women in the structures of the church, the concept of the different nature of women and issues of the power wielded by the Church in secular society. Truly feminine women, it was argued, would not wish to stand and speak in public while the church would lose influence if too many women held the positions of power in the Church. These arguments are similar to many used in opposition to the ordination of women too and show the fear that existed of women in positions of power, a state exacerbated in the case of the ordination of women given the symbolic nature of that role.

Much of this sentiment lingers today. It is true in many areas that where lay women aspire to roles in the structures of the church they are free to access them, to the extent that such roles exist for lay people in general. It is the priesthood that has had formal bars to entry for women and these practical hinders have served to bring this one aspect of the place of women in the church to the fore. Jacqueline Field-Bibb has written a history of the movement towards this decision which traces the role of women as ministers in the Church as members of sisterhoods and as deaconesses from the mid 1800’s through to the vote of 1991. Before the 1860’s, she notes, there was no officially recognised place for women in the structures of the Church even after this date women were not given a clear place by the Church, a thesis in which she is supported by Sean Gill, who sums up the position with the words of Florence Nightingale

The Church of England has for men bishoprics, archbishoprics, and a little work … For women she has what?

184 Gill 1994, 135.
Florence’s lament is still shared by many women in the Church today. Following protracted debate the General Synod of the Church of England finally voted to allow the ordination of women in 1992, a decision ratified by Parliament the following year which means that the Church has, at the time of writing experienced a decade of the ministry of ordained women and women are now beginning, if only slowly to permeate the structures of the Church. A breakdown of figures based on gender is not available for the entire group of licensed ministers, but in the case of full time stipendiary ministers it is possible to see that out of a total of 9,352 diocesan clergy in 2001 only 1,194 were women, breaking this down further it can be seen that of those who are incumbents or who have incumbent status 6,474 are men and 678 women, while as regards assistant curacies almost half the number of posts are held by women as men (1,053 men and 445 women). While projections, based on retirement figures and numbers at theological training college predict a rise in the number of women in full time stipendiary ministry from 1,260 in 2001 to 1,530 in 2005 and a drop in the number of men over the same period from 8,150 to 7,610 there are still significantly small numbers of women in leadership positions in the Church. It must be noted however that this is partly due to concessions made at the time of the vote preventing women entering the episcopate. However of 370 dignitaries only 14 are women and only 114 of the posts in this category are Bishoprics for which no women are eligible. Further details of the settlement put a ban on the discussion of women bishops until 10 years after the vote,185 introduced new posts of ‘Episcopal Visitors,’ popularly referred to as flying bishops who have Episcopal oversight over those clergy who feel they cannot accept the ordination of women or the Episcopal leadership of those who ordain women and gave parishes the option of adopting certain resolutions through which mechanism they can refuse to consider women priests for appointment. The impact of these measures limiting the progression of women into the hierarchy of the Church and their opportunity to, like their male colleagues apply for placement in any parish of the country, has been wider than the immediate issue. The measures once in place require a not insignificant amount of coordination at local level and even if the issue has, for many, receded over the past decade as a major issue for the church a significant number of respondents to a recent study felt that coping with the practicalities and theological issues raised by the divided church created by the 1992–4 settlement to be a more pressing and time consuming issue than the debate over the ordination of women.186

As noted briefly above the opportunities for women to assert influence as lay people in the Church are marginally greater although there is little research on the matter. In July 2004 of 504 elected and appointed members of General Synod 558 posts were filled. Of these 54 seats are Bishops, 247 clergy and 257 laity. Perhaps unsurprisingly given the 5-year term of the General Synod (the last elections were in September 2000) 215 clergy seats were taken by men and only 32 by women. The laity are more evenly balanced even if men are in the majority with 136 seats,

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185 The issue is now under discussion in a specialist working group set up to advise the House Of Bishops, a publication from this group is expected in the next year.
186 Jones 2004, xi.
women hold 121. One study that has been made in this field, although it is now rather old, was carried out by Medhurst and Moyser during the Synod elections of 1975. At this time 31.6 percent of those contesting the election were women showing a predominance of male candidates inconsistent, they conclude, with the predominance of women as churchgoers. A situation which, it would seem, remains true today.

Concluding remarks

This all too brief sketch of the situation in contemporary England as regards both religion and welfare service provision alongside notes on the historical legacy in both contexts highlights a number of areas where Church and State interact and where societal developments in coming years could have a particularly significant impact on the role that the Church has to play in welfare in the future. The case study undertaken in Darlington will highlight the impact of a number of these issues at a local level and provide further detailed evidence of the current situation which can be analysed against the background of the national situation and the wider European context.

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Workforce jobs by industry 1959–2003 Time-Series data set
The German welfare system

The German social state and its origins

The German welfare system is called the social state (Sozialstaat). The constitution of the Federal Republic of Germany, the Grundgesetz (GG), commits the state to its social character. It reads: “The Federal Republic of Germany is a democratic and social federal state” (Art. 20, 1 GG). This is applied to the constitutions of the federal states (Art. 28, 1 GG). The term “welfare state” (Wohlfahrtsstaat) which is often used in the international debate has a negative connotation in Germany. Both in political and public discussion this term is linked to a comprehensive and powerful state which provides for its citizens from birth to death. After experiences during the national socialistic regime and the socialist regime in Eastern Germany a strong state with comprehensive knowledge about its citizens is seen as a danger for democracy and citizenship rights in Germany.

With reference to the classification of the Danish political scientist Gøsta Esping-Andersen the German welfare system is often described being conservative and corporatist. There are several aspects one could put forward to support such a point of view. In contrast to the political order in Germany the welfare system represents astonishing continuity. The construction of the German social state still reflects its origins in the Bismarck social insurance laws. The insurance system that was introduced during the 1880s was meant to protect against the big “risks” of life in industrialised society: illness insurance (1883) accident insurance (1884) and pension insurance (1889). Only unemployment insurance (1927) was established later than in many other European countries. In 1995 the insurance system was completed by the introduction of care insurance.

Literature often refers to the so called Imperial Message as the day of birth of the German social system. In a formulation by the chancellor of the Prussian dominated German empire Otto von Bismarck the German Emperor promised to “heal the existing social damages” by seeking new ways of promoting the welfare

1 Cf. article 20, 1 Grundgesetz: “Die Bundesrepublik Deutschland ist ein demokratischer und sozialer Bundesstaat.”

2 Cf. article 28, 1 Grundgesetz: “Die verfassungsmäßige Ordnung in den Ländern muss den Grundsätzen des republika
tischen und sozialen Rechtstaat im Sinne dieses Grundgesetztes entsprechen.”


5 Schmidt 1988, 118.

of the workers. But Bismarck’s policy was not only intended to ease social needs. Another main purpose of the reforms was to calm the social rebellion, to repress the social democrat activities and to weaken the workers’ movement. This is well exemplified by the legislation. At the time during which the social insurances were introduced, the right of assembly was restricted.

Leading representatives for the social movement within German Protestantism became Bismarck’s advisers in social policy. The lawyer Theodor Lohmann who was member of the central board of the Innere Mission composed essential bills to integrate the social insurances into German legislation. Bismarck himself had connections to the religious revival movement and regarded his efforts in social policy as practical Christianity in the service of legislation.

The social insurances were organised according to different occupational groups and administrated independent of the state. This meant that the social system actually maintained differences of situation and class and furthered interest groups. The first democratic state in Germany was the Weimar republic, which was formed after the defeat in World War I and the uprising against the monarchist state. The Weimar republic adhered to the existing social insurance system and tried to develop it. The Weimar constitution guaranteed, in addition to the classic human rights, basic social rights to be realised through the social insurances. Article 161 of the Weimar constitution (WRV) promised comprehensive social protection. By the means of social insurance the citizens’ health and working ability should be upheld. In spite of the economic recession of the 1920s the Weimar republic soon formed a more extensive welfare system. Social policy expanded to new groups like large families, war-veterans or tenants.

The social policy of the national socialist regime did not change the structure of the existing welfare system, but it changed its premises. In the name of the well-being of the German people the system was adapted to the racist and inhuman ideology of the Nazis. Everyone who did not fit this ideology was discriminated against, excluded and eliminated. At the same time the national socialist regime pushed societal streamlining. One of its first measures was to prohibit trade unions. The social insurances lost their right of self-government and became part of the state. The welfare system became a means by which the regime could supervise and control the citizens.

After World War II German social policy was challenged to overcome the consequences of the war. This meant compensation and public assistance for war-victims, construction of social housing, equalisation of burdens and reparations.

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8 Schmidt, 1988, 21f.
9 Zitt 1997.
10 "Rede des Reichskanzlers Bismarck vor dem Reichstag, 2.4. 1881", in Born, Henning & Tennstedt (eds.) 1993, 592.
11 Cf. Sachle & Tennstedt 1988, 76-82.
In the Western zones of occupation the thread of the social insurance system and the social legislation of the Weimar republic was picked up. Even though powerful interest groups within society (like the trade unions and the Social Democratic Party) advocated a universal welfare system after 1945 no majority was found in society in support of such a model. Self-governing social insurances and social interest groups seemed to be an effective protection against infringements by the state authorities. Even the anachronistic classification of the social insurance system into different occupational groups was maintained. The opportunity to introduce a homogenous and general system of social insurance was missed. But in contrast to the Weimar republic the Grundgesetz did not formulate any (legislation) norms concerning the economic and social order.

The Eastern zone of Germany was occupied by the Soviet Union. The emerging state in this part of the country, the German Democratic Republic, built a socialist welfare system according to its political order. The system was characterised by state domination and centralism. After the reunification, the West German welfare system was transferred even to the Eastern federal states (Brandenburg, Mecklenburg-Vorpommern, Sachsen, Sachsen-Anhalt and Thüringen). Because of this, only the West German welfare system is presented in this paper.

A second reason to characterise the German social state as being corporatist and conservative is its strong family orientation. On the one hand the welfare system does not aim at the individual, but at the individual within his or her family context. Citizens become independent members of the insurance system when starting work subject to compulsory insurance. This means that many Germans are dependent members of the insurance system being insured through their parents or their husbands or wives. On the other hand social policy is still based on a traditional understanding of family, especially in the southern federal states Bayern and Baden-Württemberg. This means that family still implies a male breadwinner who provides for a wife and children. As German social legislation sees it married couples enjoy privileges and parents, children and spouses remain responsible for each other during their whole lives. For example students only get public scholarships if their parents earn too little to finance their studies. This traditional understanding of family is also exemplified by the insufficient and limited supply of care services for children and the elderly compared to other European countries. It is still difficult for women to combine family and a full-time professional activity, especially in the

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28 Cf. Poole 2001, 159.
29 Cf. Lampert 1985, 92.
33 Bundesministerium für Arbeit und Sozialordnung 2000, article 17/8.
Western part of the country. This is seen as one of the reasons for the considerable
decline in the birth-rate since the 1970s.25

The significant family orientation of the German social state is partly due to the
strong impact of the two big folk churches, the Roman Catholic church and the
Protestant church, on German social policy. Social Catholicism in particular has
been a powerful societal force from the time of the Weimar republic until today. As
a consequence of its organisation in associations and a political party, the Zentrum
Party, during the German Empire German Catholicism gained political influence
during the 20th century.26 The importance of the principle of subsidiarity for the
social legislation depends on this development. Politicians like the priest Heinrich
Brauns, Minister of Labour in the Weimar republic, the Federal Chancellor Konrad
Adenauer and the Ministers of Social Affairs Heiner Geißler and Norbert Blüm
represent the tradition of social Catholicism.27

Summing up, the German social state can be said to be corporatist and con-
servative because it is still organised according to occupational groups and family
status. In other words, it is employment-centred and promotes a traditional family
model. Until today both fee and compensations differ considerably depending on
the insuree’s occupation, employment conditions and family status. One could say
that the German social state implicitly doesn’t intend to equalise social differences,
but to maintain the respective social statuses of the citizens.28 This lack of societal
redistribution and participation in society is currently under discussion when the
results of the PISA-study of the year 2000 are reflected upon. The mediocre results
of the pupils were not the only aspect considered alarming. The study also drew
attention to the fact that success within the German education system is closely
connected to social class and family background.29

Nevertheless, the German social state includes elements of redistribution and
solidarity as well. The social insurances are not constructed according to the
principle of equivalence (compensation corresponds to fees), but according to the
principle of solidarity. This implies an equalisation of burdens in the interest of the
more needy groups in society. According to the same principle the rate of the fee
does not depend on the individual risk of the insuree, but rather on his or her
income.30

Another element of redistribution is public assistance. All welfare systems are
founded on three principles: the principle of social insurance, the principle of
maintenance and the principle of public assistance. Often, the system is a mixture of
these principles. Within the German social state the principle of social insurance
dommates. The principle of maintenance which compensates sacrifices for the
society and pays non-financial contributions to the society (e.g. state support for
civil servants or war-victims) is less prevailing. The principle of public assistance

28 Cf. Esping-Andersen 1990, 60f.
implies, within the German social state, both public assistance (Sozialhilfe), housing benefits and public scholarships for higher education. All German inhabitants in need who are unable to help themselves and who cannot get help from anyone else have the right to public assistance. But unlike social insurance public assistance is means-tested. Compared with other European states the compensation provided by public assistance is relatively generous. But even public assistance is influenced by the family orientation of the social state and by the principle of subsidiarity. It is only paid if the family, that means the spouse, companion, parents or children do not manage to solve the problem on their own. This practice is criticised by international welfare researchers because it strengthens family dependency, often to the disadvantage of women and young people.

Apart from the financial autonomy and self-government of the social insurances the integration of independent (non-commercial) welfare organisations into all areas of health care and social work is another important corporatist feature of the German social state. These include the Protestant “Diakonie,” the Catholic “Caritas,” workers’ movement’s “Arbeiterwohlfahrt” the “German Red Cross,” the umbrella organisation for all idealistic independent welfare organisations “Deutscher Paritätischer Wohlfahrtsverband” and the Jewish “Zentralwohlfahrtsstelle der Jüdischen Gemeinde.”

Historically the participation of the independent welfare organisations as significant actors within the German social system was legally implemented after World War I when the state took over an increased social responsibility. During the first years of the Weimar republic the municipalities and the welfare organisations were competing for influence in the field of welfare. Supported by the Catholic Zentrums-Party the free welfare organisations succeeded in driving through a social policy in favour of their (financial) interests.

After World War II and after the experience of the totalitarian National Socialist regime policy aimed to avoid any form of centralisation and streamlining of society. Again, the churches, which were almost the only intact organisations left, and their welfare organisations became important partners of the emerging German social state. The ruling party during the 1950s and the 1960s, the conservative Christian Democratic Party, continued the tradition of the Weimar Republic. The legislation and the social reforms of that era gave the independent welfare organisations and the church related organisations in particular a privileged position, often in the face of opposition from the Social Democrats.

Today their strong position within the welfare system rests upon the principle of subsidiarity which has been accepted as a guiding principle for German social policy and social legislation. To understand the role of the churches and the church-

\[32\] Cf. Poole, 2001, 159.
related organisations within the German social system one has to understand the principle of subsidiarity and its realisation within the German social state.

The principle of subsidiarity

The principle of subsidiarity is usually traced back to the social doctrine of the Roman-Catholic church. The encyclical “Rerum novarum” published by pope Leo XIII in 1891, which discusses the problems of industrialisation and the workers’ movement, is considered to contain important elements of the principle of subsidiarity. But first 40 years later, in pope Pius XI’s encyclical “Quadragesimo anno” the principle was formulated more clearly. The German Jesuit Father Oswald von Nell-Breuning and a free circle of Catholic intellectuals, the “Königswinter Kreis,” championed many of the ideas found in the encyclical within Germany society.

The concept of subsidiarity was, however, not new. Nell-Breuning refers to Thomas of Aquinas and mentions that Abraham Lincoln introduced a similar concept into the politics of the United States of America. Moreover, the principle of subsidiarity has Protestant origins as well. A study of the European Commission led by the Belgian Marc Luyckx points out that subsidiarity is a fundamental thought of the reformation. It influenced, for example, the early Calvinistic church law on the Emden-Synod (1571). In addition, even the liberal state theories of the 17th and the 18th century are reckoned among the roots of the principle of subsidiarity. According to liberal state theories the individual provides for himself or herself and his/her family in the context of a self-governing market. The state intervenes only if the market is disturbed. But Germany never had a liberal state like that. Because of this, the encyclical “Quadragesimo anno” and Catholic intellectuals and politicians played a decisive role in establishing the principle of subsidiarity as a guideline within the German social state.

According to Catholic social doctrine every human society is characterised by two competing principles: the principle of person formulating the right and the need of the individual to live her or his live autonomously and the principle of solidarity describing the human need to form communities and to feel mutual responsibility for fellow human beings. Originally the principle of solidarity was meant to mediate the relationship between individual and community, between the principle of person and the principle of solidarity.

The crucial paragraph 79 of the encyclical “Quadragesimo anno” states, that it is unjust und confusing for society, if the superior community interferes as long the

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38 Nell-Breuning 1990, 87ff.
individuals or the smaller and inferior community are able to cope with the situation themselves.42 Transferred to the political order the principle of subsidiarity regulates, on the one hand the relationship between citizen and state, that means the relationship between individual, family and society, and on the other hand the relationship between associations and state. The principle of subsidiarity lays emphasis on the right of the individual to help herself or himself. Society should not intervene, before it is clear that the individual – and his/her closest community: the family – cannot cope with the problems on their own. Help to self-help is always preferable. Moreover, the principle of subsidiarity is also used to define the role of the independent (non-commercial) welfare organisations within the German social state. In this perspective, social legislation starts from the assumption that smaller, inferior communities – like the independent welfare organisation – are closer to individuals in need and to local problems and therefore more competent to find suitable solutions. Correspondingly a superior community – such as the authorities of the social state – is only to interfere if the inferior community cannot handle the situation itself. Family is the community closest to the individual. Consequently the principle of subsidiarity highlights the mutual responsibility within the family. Secondarily the individual in need can turn to associations, self-help groups, social interest groups or independent welfare organisations. The criteria “close to the person in need” becomes a means to draw a line between public and independent welfare. According to this point of view, the main task of the state is to protect and to promote the smaller, more person orientated communities.43

The principle of subsidiarity is a political guiding principle, not a legal norm. Nevertheless, it has had a decisive impact on most of the reforms within social legislation since the 1950s and especially in the 1960s (in particular the Bundes-sozialhilfegesetz, the Kinder- und Jugendhilfegesetz). According to these laws an independent welfare organisation should take precedence over public providers whenever new social or health care services were to be established. The state or the municipalities should only provide the service if there were no independent organisations interested in running it. In 1967 the Federal Constitutional Court confirmed that the laws conformed to the constitution. This tendency in legislation and practice is called “privilege of associations” (Verbündeprivileg) or the “relative priority” (bedingter Vorrang) of the free welfare organisations, which was common practice until the middle of the 1990s.44

It is important to stress that the German state still is responsible for the social security of the citizens. In addition to social insurance it is primarily the social state which can be sued for claims for legally guaranteed compensation, not the independent welfare organisations. But the state obligation to provide social warranty does not imply that the state and the municipalities provide all social and health care services

43 Cf. Ettwig 2000, 34; For a critical perspective on this limited and pragmatic understanding of the principle of subsidiarity cf. for the Catholic point of view Nell-Breuning 1984, 88–95, 93; and for a Protestant point of view Rendtorff 1962, 405–430.
themselves. They are free to delegate these tasks to other independent organisations and providers. But they are obliged to reimburse the organisations for the cost of providing the legally guaranteed social service. This model of delegating public tasks to independent providers and refunding them for their services is characteristic of the German social state.\(^4\) It gave the independent welfare organisations an extraordinary role within the welfare system. At the moment between 30–60 percent of all services in the field of social work and health care are run by independent welfare organisations.\(^6\) The church related independent welfare organisations Caritas and Diakonie together have about 900,000 employees and about 52,000 members (i.e. independent institutions and initiatives which are members of their parental organisations). They are by far the two biggest independent welfare organisations in Germany.\(^6\)

**Characteristics of the independent welfare organisations**

There is astonishing variety in the organisational forms of independent welfare organisations (die freie Wohlfahrtspflege). They might be associations, foundations, church bodies, registered associations or even private limited companies.\(^4\) But all of them comply with three characteristics:\(^4\)

- Organisations which undertake independent welfare work (Freie Wohlfahrtspflege) have to act in the public interest or to be of public benefit (Gemeinnützigkeit). That means that the organisations do not have any commercial intents and their activities have exclusively and directly charitable and unselfish purposes. Their character of public benefit has to be expressed in the statutes. The right of public benefit in the field of welfare is peculiar to German legislation. Organisations of public interest get taxation privileges.\(^5\) This is increasingly questioned by the process of European integration and competing legal traditions in other European countries.\(^5\)
- The independent welfare organisations are basically voluntary, autonomous and self-governing even though they are subject to current legislation when providing social services on behalf of the social state.\(^5\)
- The independent welfare organisations usually have ideological links (to the churches, to the workers’ movement, to humanitarian or emancipatory values).\(^5\) On the one hand, the organisation’s ideology is expected to form the motivation of the staff of the organisations (employed and voluntary) and to

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\(^4\) Cf. Neumann & Schaper 1998, 244f.
\(^6\) Bundesarbeitsgemeinschaft der Freien Wohlfahrtspflege 2002, 166, 181.
\(^8\) Cf. Mäule 2004, 14f.
\(^9\) Cf. Lange 2001, 34ff.
\(^11\) Cf. Falterbaum 2000, 112ff.; Schmid 1999ib, 39ff. In Germany voluntary welfare organisations need not imply that the work is done mainly by volunteers. Nevertheless there are many volunteer activities in the field of social welfare and within the welfare organisations. Cf. Gaskin & Smith & Paulwitz, 1996, 63–82.
\(^12\) Cf. Flierl 1982, 24.
influence the profile of the work done in the social services and institutions. One the other hand, independent welfare providers give people in need the possibility to choose a social service or institution run by a welfare organisation whose ideology they share.54

Among the independent welfare organisations the two church-related organisations, the Catholic Caritas and the Protestant Diakonie, play the most important role. In some fields of activity, e.g. in the field of care for elderly or disabled people Caritas and Diakonie run between 50 percent and 60 percent of all social services and institutions.55 Their dominant position is not only a result of historical development but also of state-church-legislation in Germany. Church-related welfare institutions and services are legally regarded as belonging to the church bodies even though they are organisationally and financially independent.56 Furthermore, the German constitution guarantees religious freedom not only to the individual, but also to associations and organisations. It applies the positive right to exercise religion to church-related organisations like the independent welfare organisations, this means that providing social services in church-related social organisations is approved by law as a way of exercising religion (article 4 and 140 GG). By being members of the regional parental organisation (Caritasverband, Diakonisches Werk) the (private-law) church-related organisations can express their affiliation to the church. The legislator then recognises them as a part of the Roman-Catholic or of Protestant church respectively, both of which are corporations under public law. This status gives them special rights and freedoms: As long as no laws are violated the right of the state to interfere in the internal affairs of church-related welfare organisations is limited. Their right of self-determination becomes most clear where labour legislation is concerned. Unlike other employers church-related welfare organisations are allowed to engage or to dismiss employees because of their religion or their personal life style. Moreover, they have their own works councils and employee pressure groups, independent of the trade unions.57

Criticism of subsidiarity and its realisation

From its introduction as a guiding principle within the German social state the principle of subsidiarity – and its practical realisation, the relative priority of associations – was accused of mainly promoting the interests of the big independent welfare organisations, namely the church-related organisations. This criticism was often expressed by the Social Democratic Party or by representatives of smaller welfare organisations.58 During the discussion of the 1950s and the 1960s Protestant theologians, especially within Diakonisches Werk, tried to develop an alternative

58 Cf. Merchel, 301.
view of the principle of subsidiarity. They stressed the right of people in need to demand help from society and the state and emphasised their personal freedom, e.g. the freedom to choose certain services or certain types of assistance. In addition, the principle of subsidiarity was considered to be too simple for a heterogeneous society and therefore not suitable as a guiding principle for social policy.

The enormous growth of the social sector in Germany during the 1960s and 1970s led to a process of bureaucratisation, professionalisation and specialisation within the social services and also within church-related organisations. Because of this the independent welfare organisations were increasingly perceived to be similar to state authorities and municipalities. Instead of working more flexibly, more innovatively and more person- and context-orientated than public institutions they basically seemed to be interested in their own development and expansion. Self-help groups in particular criticised the larger welfare organisations for no longer being close to the local problems and to the person in need. They claimed therefore that the principle of subsidiarity should be implemented more substantially, not merely formally. Even within the churches the independent church-related welfare organisations were accused of being too bureaucratic and too profession-orientated. Large independent welfare providers with several different fields of work and more than 1,000 employees, in particular, are hardly seen as church activity any longer. The tension between the identity of the church-related welfare organisations as social service providers on the one hand and as a critical voice in the welfare system on the other hand is a frequent topic in both public and church debate. Some arguments advise the church-related welfare organisations to give up their social service production and to concentrate on help for marginalised people in need. Others suggest that the independent welfare organisations along with the church parishes and church districts should focus on the local community and the needs of the people living there.

The expansion of the independent welfare organisations endangers even their remaining distinctive mark, the ideology. The independent welfare organisations have increasing difficulties in recruiting personnel who fit both the ideological and the professional requirements. In the case of the church-related organisations this means that the employees (and volunteers) have to have both a Christian motivation and the necessary professional training. With the process of secularisation in mind one could imagine that it is a growing challenge to find suitable personnel, but if the church-related welfare organisations don’t succeed their diaconal profile and Christian identity will weaken.
The crisis of the German social state

The German social state is undergoing an existential crisis. The whole system of social security is being questioned by representatives of financial institutions, commerce and trade in particular. As labour costs handicap the competitive position of German companies in the global economy fundamental cuts in the existing social system are discussed.68 The financial situation of the social insurances is alarming following of the ongoing recession, mass unemployment and the costs of the re-unification. The rate of unemployment is constantly between 11 and 12 percent. In some regions the rate goes up to 25-30 percent.69 But the necessary reforms are that comprehensive that no political party or pressure group is able to carry out them on its own. In addition, the federal and corporatist system (with different ruling parties and with strong interest groups) complicates drastic reforms and change.70

A huge challenge for the German social state is demographic development since both pension insurance and health insurance rely on a contract between generations. Growing expectations of life along with low birth rates from the 1970s onwards results in a need for overexertion on the part of the generations who are working at present and in the future. These generations have to produce the economic basis for the social contributions of almost three non-working generations. The present and lasting economic recession and high rate of unemployment makes their social burdens even heavier.71

The construction of the German social state is based on a working majority and full employment (of the male citizens at least). These frameworks are no longer given. This is why the lasting high rate of unemployment in the Eastern federal states of Germany especially is not only a major social problem, but also has far-reaching consequences for the whole welfare system. At the moment compensations for the unemployed are being cut drastically. As a consequence of these reforms more and more people are going to depend on social assistance. It is considered an alarm signal that the percentage of families and children living on social assistance is constantly rising.72

In this situation of crisis marginalisation within society is growing. Studies show that there are certain groups of citizens which are at much higher risk of getting into a marginal position. These are immigrants, single parents, young people, especially if they have a low level of education and are long-term unemployed. About 10 percent of all children and young people have only limited access to all the opportunities society has to offer (e.g. education) and are consequently at higher risk of poverty. Actually, the obvious lack of integration in society affects both the individual lives of the young people and the future of the German economy and the German social system.73

The German case study will be performed in Reutlingen, a region which is relatively well-off economically. The city has about 110,000 inhabitants and is situated between Stuttgart and the Lake of Constance. It belongs to the economic region “Mittlerer Neckar,” one of the motors of the German economy, with industries like Daimler Chrysler, Porsche and Robert Bosch. Reutlingen experienced an early industrialisation hosting textile industry for almost a century. The crisis of the textile industry in the 1960s meant a crisis for the city. But the city politicians managed to attract the electronic industry to the city. Today Robert Bosch GmbH is the biggest employer. Reutlingen still has a low rate of unemployment (about 6 percent). But the dominance of the electronic and car industry is seen as a future danger, with for example Robert Bosch threatening to move parts of the production to Eastern Europe.

Along with the economic crisis of the German social state goes an ideological crisis. Solidarity, as a carrying value of the welfare system, is challenged by the growing individualisation in society. Citizens who belong to the middle-class tend increasingly to suspect receivers of social compensation of exploiting the social system. At the same time, the motivation to contribute to the welfare system declines because of doubts concerning the sustainability of the system.

In addition, economy and an economic way of thinking is affecting more and more areas of society. In the field of welfare, this means that the guiding lines of the free market are having a stronger impact on the German social system and its actors. The independent non-commercial welfare organisations which still provide for many of the social services are in particular concerned by this development. Their privileged position within the welfare system has, since the 1990s, gradually begun to be abolished in order to integrate commercial welfare providers into the emerging social market. The changed understanding of independent welfare organisations has been formulated for the first time in the law regulating the care insurance in 1994.

Concrete effects of the economic crisis can be perceived easily and everywhere. In order to save money the federal states and the municipalities cut down all their voluntary contributions, this means any social contributions or social services which they are not legally obliged to finance or to provide. In Baden-Württemberg, the federal state of the case study, this includes welfare centres for immigrants, people with psychological illness or the long-term unemployed. Often it has been the independent welfare organisations which have been running these services. Without public funding they are unable to run the social services on their own. This evokes difficult conflicts within the independent welfare organisations themselves.
The majority churches in Germany

Germany – a biconfessional country

From its christianisation in the 5th and 6th centuries the territory of today’s Germany was dominated by the Roman Catholic Church. This changed fundamentally as the Reformation movement grew and spread during the 16th century. At first the Reformation was only adopted in some of the German territories and Imperial cities. Different denominations coexisted closely with one another until the peace of Augsburg (1555) when the responsibility to regulate the denomination was transferred from the Emperor to the ruling powers in the territories and the Imperial cities. The differences in religion evoked conflicts in society which ultimately set off the Thirty Years’ War.80

In 1806 the legal consequences of the French Revolution became evident in the German territories. The spiritual territories (which were governed by Catholic dignitaries) and the Imperial cities (which were often Protestant) were integrated into secular territories. These changes in structure reduced the influence of the Roman Catholic Church. 3 million Germans became citizens in a state where another denomination prevailed and the denominationally mixed territories emerged.81 At the beginning the coexistence of the denominations was characterised by tolerance, but from the middle of the 19th century segregation can be observed which split society into a Protestant and a Catholic party. The Catholic party in particular started to organise itself through associations, interest groups and a political party, the “Zentrum-Partei.”82

After the German defeat in World War I the first democratic state was formed in Germany, the Weimar republic (1919). The articles 136–139 and 141 of the Weimar Constitution guaranteed the citizens freedom of religion, which had gradually been introduced into the territories and the German empire since 1806. The traditional government of the Protestant churches by the secular sovereign (landesherrliches Kirchenregiment) came to a sudden end. State and church were separated. The Weimar Constitution established state neutrality in the field of religion and Weltanschauung (worldview)(article 135 and 141 WRV). The Roman-Catholic church and the Protestant churches remained corporations under public law (article 137 I), but became autonomous in relation to the state.83

Church historians usually divide the church policy of the National Socialist regime (1933–1945) into two periods. First, the regime wanted to win the churches for its political intensions.84 But the growing totalitarian claim of the National Socialist Party made it change its policy and from 1935 the regime tried to marginalise the churches. It was forbidden to be member of a church association

81 Campenhausen 1996, 29ff.
82 Greschat 1980, 72ff.
84 Scholder 1989a, 280–286.
and the compulsory National Socialist organisation at the same time. Many church-related organisations, schools or newspapers were closed.\footnote{Scholder 1989b, 204-314.}

After World War II the churches were soon integrated into the reconstruction of the ruined country. In the British and the American occupation zone especially the churches were early conceded freedom of action, both within the area of religion and the area of politics.\footnote{Greschat 1997, 254f.} Since their structure covered the whole territory, the churches undertook the task of distributing the relief parcels containing food and clothes all over the country.\footnote{Wischnath 1998, 250–257.}

The preamble of the constitution of the Bundesrepublik Deutschland (Grundgesetz) refers explicitly to God. This was a consequence of the experiences of a totalitarian regime.\footnote{Huber 1996, 30ff.} The constitution gave the two folk churches a privileged position assuring both their autonomy and their right to participate in society. On the one hand the constitution maintained the separation of church and state introduced by the Weimar constitution. But at the same time it confirmed the churches as corporations under public law and defined them as an integrated part of democratic society.\footnote{Article 4 GG, 140 GG; Winter 2001, 51f.} The extraordinary role played by the church-related welfare organisations within the German social state is one example of the comprehensive freedom of action which the churches are guaranteed by the constitution. Their position in society is also exemplified by the fact that religion, as a compulsory subject in public schools is taught in correspondence with the principles of the religious organisations. In practice, in most of the federal states, the two churches are the only religious organisations approved to cooperate with the school authorities.\footnote{Campenhausen 1996, 238–248; Evangelische Kirchen in Deutschland 1994a.}

The position of the churches in the Eastern part of Germany was much weaker. Though the constitution of the German Democratic Republic picked up the thread of the church legislation in the Weimar Republic, church employees and church members experienced threats and restrictions from the 1950s onwards. This implied ideological pressure, personal threats, spies or arbitrary arrests. The youth organisation of the Protestant church (Junge Gemeinde), in particular, was an early target of the oppressive socialist church policy.\footnote{Greschat 1997, 273ff.} As a consequence of the pressure people left the churches and didn’t baptise their children any longer.\footnote{Evangelische Kirchen in Deutschland, 2004d.} At the same time the churches became meeting places for regime critics and alternative thinking. The civil rights movement grew strong within the churches during the 1980s. The peaceful revolution of 1989 emerged mainly from church related circles.\footnote{Lindner 1998, 15–24, 63–83; for an East German perspective on diaconia cf. Turre 1991.} Since the reunification the number of church members in the Eastern federal states has not increased distinctly. This was a disappointment for many church members. Today

28 percent of the East German population and 76 percent of the West German population belong to the churches.94

Statistics on religion in Germany

There is no majority church in Germany, but two big folk churches which are almost the same size or have the same number of members, even though there are considerable regional differences. Of the 82,536,680 inhabitants of Germany at the end of the year 2002 26,466,076 officially belonged to the Catholic Church and 26,211,487 to Protestant churches. Expressed in percentages 31.8 percent belong to Protestant churches and 32.1 percent to the Catholic church. Altogether 63.9 percent of German inhabitants are members of one of the folk churches. After the reunification the German population can be divided into three major religious groups: two parts of 26 million each are Catholic and Protestant and about 23 million inhabitants do not have “any confession,” that means they are officially not registered as members of any religious organisation. The number of members of both folk churches is constantly declining.95

In addition, about 3.3 millions Muslims live in Germany. Two thirds of them have their origins in Turkey and 500,000 of them have a German passport.96 Statistics about the Muslim population are limited, because Muslim organisations are not comparable to the Catholic and Protestant model. This is one reason why there is still no subject “Islamic religion” in the public schools of most of the federal states. The school authorities do not accept the existing Muslim organisations, which represent only a few members, as partners for teaching.97 But the lack of integration of Muslims into public life is not only an organisational, but also an ideological problem. This is exemplified by a recent example of a conflict over a Muslim teacher wearing a headscarf while teaching. Several federal states, among them Baden-Württemberg, have recently passed a law which prohibits teachers from wearing a headscarf in public schools. This has evoked a broad and polarised discussion about religious symbols in public schools.98

About 1.2 millions inhabitants in Germany belong to one of the Orthodox Churches. Circa 360,000 belong to other Christian churches like the Free Churches.99 Moreover, there are about 100,000 German inhabitants officially registered as being Jewish. Their number has been growing since the 1990s as many Jews from the former Soviet Union have come to Germany.100

95 Statistisches Bundesamt 2004.
96 Zentralrat der Muslime in Deutschland 2004.
97 Moritz 2004.
100 Evangelische Kirchen in Deutschland 2004c.
101 Scherer 2003, 24f. The statistics of the Catholic and the Protestant Church are much better documented than the statistics of the other religious organisations. This depends partly on the church taxation. Apart from the two big folk churches only some Jewish parishes and some Free Churches have applied for the right to church taxation. As the state
As mentioned above the distribution of Catholics and Protestants among the population differs considerably in the different regions depending on the traditional religion in the area. In areas with a Catholic tradition like the federal state of Bavaria almost 60 percent of the population are Catholics while in Schleswig-Holstein almost 60 percent are Protestants. Baden-Württemberg, where the case study is taking place, is a denominationally mixed federal state with 39.1 percent Catholics and 34.9 percent Protestants. This is due to the fact that Baden-Württemberg is a composite federal state including different territories and cities with different religious traditions. Compared to other federal states Baden-Württemberg has high rate of immigration. About 12.1 percent of the population are immigrants. In figures: of the circa 10.5 million people who live in Baden-Württemberg circa 1.3 million are immigrants. Only Hamburg and Berlin have higher shares of immigrants while East German federal states have rates ranging from 1.7 percent to 2.4 percent.

The town of the German case study, Reutlingen, has a Protestant tradition and Protestant majority among the population. It was a centre for the South-Western German reformation movement during the 16th century and was one of the two towns which signed the Confession Augustana. After World War II it became more and more denominationally mixed. Many refugees from former German areas in Eastern Europe and many working migrants who moved to Reutlingen were Catholics. Today about 43.8 percent of the 108,000 inhabitants of Reutlingen belong to the Protestant church, 24.3 percent are Catholics and 31.9 percent belong to other Christian denominations, to other religions or to no religions at all. This includes an estimated 6 percent Muslims. 15.4 percent of the population in Reutlingen do not have a German passport, represented in this figure are more than 3,000 Turkish and over 3,000 Greek citizens. This means that the share of immigrants in Reutlingen is higher than in the federal state as a whole.

As the subject of the study is Reutlingen where the Protestant Church is the majority church, the report presents the structures, figures for and tradition of the Protestant Church in the following paragraphs:

The statistics about church activities in the EKD in 2001 show the following figures: About 30 percent of all children born in 2001 have been baptised within one of the Protestant Churches, 17 percent of couples got married in one of these churches and 39 percent were buried in church. The figures look different if they include only the members of the Protestant Churches. In 2001, 112 percent of children with two Protestant parents and 78 percent of children with one Protestant parent were baptised in one of the EKD-churches. 88 percent of all Protestants were collects all taxes, even church taxes, the registration offices ask directly if someone belongs to one of the two folk churches during registration. Campenhausen 1996, 256–270.

101 Evangelische Kirchen in Deutschland 2003c, 8.
102 Bundesamt für Migration und Flüchtlinge 2004.
105 This number comes about because of changes of residence after the birth, from foreign countries to Germany or from one regional church to the other.
buried within their church. Even the rate of confirmations is quite high. In the West German Protestant Churches, 107.9 percent of all young people who were baptised in the Protestant churches have been confirmed in one of the EKD-churches.

**Church structures and decision-making**

The Protestant Church in Germany is in practice no national church, but rather 23 independent regional churches with independent organisation and independent decision-making. These regional churches reflect the historical dukedoms or kingdoms that formed Germany for centuries. The federal structure of the German state can consequently be found in the church structure as well. Even the dioceses of the Catholic Church in Germany reflect this historical development. The regional Protestant churches vary in size from about 60,000 members (in Schaumburg-Lippe or in Anhalt) to more than 3 million members (in the church of Hannover).

Even denominationally the Protestant Church in Germany can be called a mixed cooperation. As the reformation took diverse routes in the different German territories, there are several denominations represented within in the so called Evangelical Churches in Germany (Evangelische Kirchen in Deutschland/EKD). The EKD is a union representing Lutheran churches (like the church of Bavaria or Hannover, so-called “united churches” (unierte Kirchen) like the church of Berlin-Brandenburg, and the Reformed Church. It is important to stress that the EKD is a voluntary union and works mainly like a parental organisation for all Protestant churches in Germany. Its tasks are public relations, lobbying and statements on a national level, guidance of the regional churches plus administration of the common international activities of the Protestant Churches (e.g. the administration of German Protestant parishes in Europe and on other continents). The EKD has almost no legislative responsibility. Church legislation is mainly the responsibility of the regional churches. They can decide to delegate certain limited areas of church legislation to the EKD.

In the federal state of Baden-Württemberg there are two Protestant regional churches, the “Evangelische Landeskirche in Baden” and the “Evangelische Landeskirche in Württemberg.” Correspondently, the Catholic Church in Baden-Württemberg consists of two dioceses: the Archdiocese of Freiburg and the diocese of Rottenburg-Stuttgart. As there are considerable organisational differences between the different Protestant churches and as Reutlingen is part of the “Evangelische Kirchen in Deutschland 2004d.

106 Evangelische Kirchen in Deutschland 2004d.
107 Evangelische Kirchen in Deutschland 2003b, 8. Again, the number comes about because of changes in residence, especially from foreign countries to Germany. As there are no statistics about baptisms in the East German protestant churches during the 1980s these churches aren’t taken into consideration within this survey.
108 Evangelische Kirchen in Deutschland 2004a; 2004b.
109 Evangelische Kirchen in Deutschland 2003a, 4.
110 Evangelische Kirche 2004b, article 1.
111 Evangelische Kirchen in Deutschland 2004b, articles 6–20; Broll 1999, 194–209.
Landeskirche in Württemberg," the structure and the decision-making processes of this particular church will be presented in the following paragraphs:

The territory of today’s “Evangelische Landeskirche in Württemberg” was influenced both by the Lutheran and by the Reformed reformation movement. During the 18th century, Württemberg became a stronghold of the Pietistic movement. In contrast to other German territories, the government of Württemberg permitted the members of the Pietistic movement their private assemblies in 1743. This permission led to a strong integration of Pietism in the church of Württemberg.112 These traditions can be traced in the organisational structure, decision-making and the liturgy of the “Evangelische Landeskirche in Württemberg.” On the one hand the church has an Episcopal structure. It is headed by a bishop and by four regional bishops (Prälate) who have their chairs in Stuttgart, Reutlingen, Ulm and Heilbronn. The High Consistory is a board with 9 members (plus the regional bishops) and responsible for the church administration.113 But the structure of the church is not centralised. It is divided into 51 church districts (Kirchenbezirke) with 51 superintendents (Dekane) in charge. These superintendents have far reaching responsibilities in relation to church administration and are responsible for the church personnel. Unlike the bishop and the regional bishops they have disciplinary power over the employees.114

The Reformed and Pietistic influences are reflected by the democratic structure of the church. A parliament (Landessynode) makes the legislation of the church and elects the bishop (for a life-time period up to the age of 68). The members of the parliament are elected directly every six years. The “Evangelische Landeskirche in Württemberg” is the only church within the EKD which gives all their church members the right to directly elect their representatives into the parliament.115 The election procedure is similar to that of public elections. The territory of the church is divided into 26 electoral districts. Each district sends at least one clergy and one lay representative to the church parliament. Altogether 60 laypersons and 30 theologians are elected onto the church parliament.116 The candidates for the parliament are organised in three independent church parties, which are not related to the political parties. These parties are: “Lebendige Gemeinde” (Living Parish) representing a conservative and pietistic tradition, “Evangelium und Kirche” (Gospel and Church) holding a conciliatory position and the liberal “Offene Kirche” (Open Church).117 At the moment, the conservative party (Lebendige Gemeinde) represents the majority in the church parliament.

The church parties don’t, however put forward candidates at parish level. Even though the representatives of the parish councils and the church parliament are elected at the same time (every six years) the parish election is strictly personal.

113 Evangelische Landeskirche in Württemberg 1995a, 190ff.
114 Evangelische Landeskirche in Württemberg 1995a, 34.
115 Evangelische Landeskirche in Württemberg 2004a.
116 Evangelische Landeskirche in Württemberg 2004b.
117 Evangelische Landeskirche in Württemberg 1995a, 103ff.
Candidates have to have reached the age of 16 and be member of the local parish (through their place of residence).\textsuperscript{118}

The “Evangelische Landeskirche in Württemberg” has a geographical structure embracing its whole territory with its 1,415 parishes and 51 districts. The parishes have a strong position within the church and are granted much independence. They are corporations under public law and self-governing.\textsuperscript{119} The size of the parishes differs considerably from 500 to more than 10,000 members. In the head of the parish is the parish council with 5 to 18 members depending on the size of the parish. The ministers belong by reason of their ministry to the parish council.\textsuperscript{120} Often the minister in charge of the parish also has the chairmanship of the parish council, but in principle every council member is empowered to chair the council.

At the moment the “Evangelische Landeskirche in Württemberg” has 2.4 million members and circa 4,000 employees. 2,330 of them are ordained.\textsuperscript{121} But a description of the elected bodies illustrate that the church structure is founded on the participation of lay people and volunteers. In 2002, church statistics reveal almost 131,000 volunteers. 92,861 of them were women. It is not only the parliament and the councils which need volunteers. Volunteers work with children and young people, teach in Sunday school, edit the parish newspaper, sing in choirs, visit old people, hold services, help people in need (e.g. in circles for refugees or drug addicts) and much more.\textsuperscript{122}

In 2003, the “Evangelische Landeskirche in Württemberg” had a budget of about 270 million €. Almost 70 percent of income comes from the church tax. In addition, the church has income from public contributions, from reimbursement for teaching religion in public schools and from investments and landed property.\textsuperscript{123} The church tax is linked to the public income tax and amounts to 8 to 9 percent of the total income tax.\textsuperscript{124} Since the middle of the 1990s income from the church taxes has been stagnating and declining. This is due to the constant and growing unemployment, as people who are unemployed don’t pay income tax and consequently not church tax either.\textsuperscript{125} As almost 80 percent of expenditure is made up of direct and indirect expenses for personnel (often with long-term contracts like the ministers) it is difficult for the church to make short-term savings. This is also true for the parishes, which are financially independent. Even though they don’t pay for the ministers, whose salaries come directly from the regional church, the personnel expenses they incur still amount up to 50 percent of the parish budget.\textsuperscript{126}

\textsuperscript{118} Evangelische Landeskirche in Württemberg 1989, §§ 11–14.
\textsuperscript{119} Evangelische Landeskirche in Württemberg 1989, § 2.
\textsuperscript{120} Evangelische Landeskirche in Württemberg 1989, § 11–12.
\textsuperscript{121} Evangelische Landeskirche in Württemberg 2003, 75. The statistics doesn’t count the deacons employed by the church as the threefold ministry still isn’t established in the Evangelische Landeskirche in Württemberg.
\textsuperscript{122} Evangelische Landeskirche in Württemberg 2003, 81.
\textsuperscript{123} Evangelische Landeskirche in Württemberg 2003, 82.
\textsuperscript{124} Campenhausen 1996, 262f.
\textsuperscript{125} Evangelische Landeskirche in Württemberg 2003, 82.
\textsuperscript{126} Evangelische Landeskirche in Württemberg 2003, 83–85.
Church-related welfare in relation to the state and to the church

Up until the Middle Ages the church, the family and the guilds were the most important institutions of social welfare. Poor, sick and old people looked for help in monasteries. Hospitals were mostly based on church-related foundations. But the effects of natural disasters and huge epidemic sicknesses during the late Middle Ages affected so many people that the existing social institutions were unable to handle the spreading misery and poverty. As many of the people in need came to the cities, new welfare institutions were established there. The citizens started to organise poor relief and welfare organisations on their own, by which is meant independent of the church. The transition from church responsibility to civic responsibility for social welfare was also inspired by the lively theologian discussions in the context of the reformation movement. New institutions and models of welfare emerged in Catholic and Protestant areas. While the secular authorities remained those responsible for social welfare in the Protestant territories, the Catholic territories returned welfare organisation and welfare control to the church after the Council of Trient.

During the 19th century, poverty spread and new welfare needs emerged. While church welfare was blooming in the Catholic territories, the Protestant churches were discussing the role of the church within the field of social welfare. In the mid 19th century the ideas of Johann Hinrich Wichern summarised in his programmatic publication in 1848 (Die innere Mission der deutschen evangelischen Kirche – eine Denkschrift an die Deutsche Nation) received more and more support. His proposals had a considerable influence on the development of diaconia (church-related social work) in the Protestant parts of Germany. According to Wichern state, church and independent church-related welfare organisations should cooperate to solve the huge social problems in society. He called his model the threefold diaconate:

- Christian individuals, families, groups or associations have the right and the duty to practice charity. If they are moved by the misery of other human beings they have found their task. This was the basis for the foundations of many diaconal initiatives, institutions and associations as a part of a diaconal movement.
- The spontaneous individual action corresponds to the charity of the church parishes. Wichern promotes the diaconate as an independent ministry in the church.
- The state and the municipalities have the duty to establish, administrate and maintain the institutionalised welfare, which means hospitals, poorhouses and schools.

References:
127 Uhlhorn 1895, 529f.
130 Strohm 2004, 33ff.
133 Wichern 1967, 152f.
Wichern intended to co-ordinate the numerous Protestant initiatives in the field of social welfare. His programmatic publications became the start of more organised and more effective welfare activities. This new period was formed by cooperation between voluntary independent charity work in a Christian spirit (organised in associations) and public welfare regulated by legislation. According to the Protestant point of view, the state and the municipalities retained ultimate responsibility for social welfare.134

The Protestant diaconal movement started and spread outside the church itself. The church didn’t feel responsible for social welfare (according to the teaching of the two kingdoms) though social misery was obviously growing. The diaconal initiatives which were founded outside the church structure also understood themselves as a criticism of the immovable Protestant state churches. They aimed to renew the parishes and the churches.135 At the same time, many Catholic welfare initiatives were started. They were often closely linked to the religious orders and better integrated into the church structures.136 Many of today’s approximately 26,000 institutions within Diakonie and about 26,000 institutions within Caritas have their origins in this period and these traditions.137

The pressure of the National Socialist regime resulted in closer cooperation between the independent church-related welfare organisations and the churches. The integration into the churches protected the independent welfare organisations from encroachments by the state.138 After World War II the bishop of the “Evangelische Landeskirche in Württemberg” Theophil Wurm took the initiative to found a directly church-based diaconal organisation (Evangelisches Hilfswerk). Its task was mainly to distribute food and clothes in the ruined country. In the beginning, there were frictions between the church-based welfare organisation and the independent diaconal institutions organised within the Innere Mission. In 1957 the process of a fusion of both organisations was initiated. The process culminated with the foundation of the “Diakonisches Werk” in 1975.139

From a juridical point of view, the church-related welfare organisations are still part of the churches today, even though they are organisationally and financially independent. Their connection to the churches is formally expressed by membership of one of the church-related parental organisations: Caritasverband and Diakonisches Werk.140 The structure of the parental organisations reflects the federal character of the Protestant churches in Germany. There is a “Diakonisches Werk” in every “federal church.” The tasks of these parental organisations are service, lobby-

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134 Strohm 1989, 194ff.
137 Bundesanstaltgeschichte der Freien Wohlfahrtspflege 2002, 163ff, 180ff.
ing and public relations activities for their members (diaconal institutions and church districts). They do not have any decision-making authority.141

The Evangelische Landeskirche in Württemberg

The history of the church-related welfare organisations explains the complicated structure which the church related welfare activities still have today. This is exemplified in the following paragraph by a description of the structure of the diaconal work within the “Evangelische Landeskirche in Württemberg.” Both parishes142 and church districts run social services and institutions. They are organised in diaconal boards at the level of the church district, as the church districts are members of the regional parental organisation, Diakonisches Werk. But most of the social services are provided by church-related welfare organisations, which are organisationally and financially independent of the churches. These welfare institutions and initiatives, which are often organised as associations, as foundations or as private limited companies in the public interest (gGmbH) are direct members of the regional Diakonisches Werk.143

The complex structure is also reflected in the diaconal work in Reutlingen. There are welfare activities on all three levels mentioned above. Within the area of the city of Reutlingen there are eleven parishes. The church district of Reutlingen is divided into 35 independent parishes. Some of the parishes have child care institutions, groups for refugees or home nursery services.144 On the level of the local authority district the church runs a big welfare centre with different services such as, help for drug and alcohol addicts, families, people with psychological illnesses, young people, migrants or poor and unemployed people. During the winter one of the city churches (Nikolaikirche) is open all day for everyone who needs a warm place to stay and cheap food.145 Furthermore, even the level of independent church-related welfare organisations is well represented in Reutlingen. The “Bruderhaus-Diakonie,” a recent fusion of the “Gustav Werner Stiftung” and the “Stiftung Haus am Berg” has more than 3,000 employees in the fields of care for the elderly, care for disabled and people with psychological illnesses, care of children and young people and education.146 The structure becomes even more complicated as the structures of the “Bruderhaus-Diakonie” and the structure of the communal district don’t harmonise with the church structures. The “Bruderhaus-Diakonie” has activities in 14 local authority districts147 and the local authority district of Reutlingen includes 3 church districts.148

141 Cf. for example Diakonisches Werk Württemberg 1998, 2ff.
142 Often parishes run services for child care or home nursery services. Cf. for example Grote 1995.
144 Evangelischer Kirchenbezirk Reutlingen 2003a.
145 Evangelischer Kirchenbezirk Reutlingen, 2003b.
147 Gustav Werner Stiftung 2002, 27.
Church statements on welfare and diaconia

There are a multitude of statements on diaconia and social welfare published at all levels of the Protestant churches and the church related welfare organisations within the Diakonie. On the one hand there are statements of the national “Diakonisches Werk der EKD” and statements of the regional parental organisations. On the other hand there are statements of the Protestant churches at national level (EKD) and at regional level. One of the tasks of the EKD is to organise discussion groups (chambers) on different important subjects within church and society. The chamber of social order (Kammer der Evangelischen Kirche für soziale Ordnung) deals with matters of welfare and regularly publishes statements on urgent social questions, for example on the future of welfare in the European Union, on the health system or on the future of social services in society. Even the regional churches discuss the subject diaconia and make statements on the matter of social welfare, for example on the occasion of the report of a newly elected bishop. These numerous statements make it difficult to obtain a general view and to grasp the essence of the churches’ point of view. Common statement of two or more churches or welfare organisations are as a rule better received by the public opinion, for example the common report of Diakonisches Werk and Caritasverband on the social situation of people in the Eastern federal states; the much discussed statement of both the Catholic church and the Protestant churches on the social and financial situation in Germany or the common paper of the regional diaconal parental organisation and the regional church in Württemberg on pastoral care in homes for elderly people.

Today, the Protestant churches formulate their social responsibility and diaconal orientation clearly. There are good reasons for this understanding. Studies within the EKD show that more than 40 percent of church members remain in the church because of its welfare work and almost 80 percent expect diaconal activities from their church. With these figures in mind the financial engagement of the churches in the field of diaconia is quite modest. Estimations for the West German regional churches assume that the expenses for diaconia within the church budgets will amount only to about 10 percent. But at least the printed word leaves no doubts: The statutes of the EKD say that diaconia is “expression of the character and the life of the church.” This formulation is often cited both in the laws on diaconia of the regional churches and in the statutes of diaconal institutions. The law on diaconia

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149 Cf. for example Diakonisches Werk der EKD/Deutscher Caritasverband 1997; Diakonisches Werk der EKD 1999.
(Diakoniegesetz) of the Evangelische Landeskirche in Württemberg says in its first paragraph:

1. Diaconia is the living belief of the Christian parish in word and action. …
2. The diaconal mission as an expression of the character and the live of the church is exercised
   1. by the church parishes,
   2. by the church districts, …
   4. by the diaconal institutions …,
   5. by the Diakonisches Werk der evangelischen Kirche in Württemberg e.V.,
   6. by the regional church.159

The theological discussion on diaconia reflects this development: In the academic discussion church diaconia not only implies the aspect of help oriented towards the individual, but also institutional services and change of structures. Consequently, the current theology of diaconia affects both the understanding of ecclesiology and of ethics.160

Situation and policies regarding gender

Industrialised societies are characterised by a separation into a private sphere and public sphere. While men are responsible for the “productive” paid work outside the private sphere, it has been traditionally taken for granted that the women undertake the “reproductive” unpaid work at home, which means: care for children, the elderly and the household.161 The importance of a separate private sphere is stressed by the German social state. This is partly due to the fact that the principle of subsidiarity has been and still forms a central precept of German social policy. The right of the individual to solve his/her problem within the closest community lays much welfare responsibility on the reproductive, unpaid and women-dominated sphere.162

Susanne Schunter-Kleemann, in her study about the situation of women in modern European welfare states, shows that all systems are based on a kind of patriarchalism marginalising women and the reproductive work done by them.

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159 “(1) Diakonie ist gelebter Glaube der christlichen Gemeinde in Wort und Tat …”
162 Schmidt 1996a, 198ff.
Germany – along with Austria, the Netherlands and Switzerland – is described as an example of “marriage-related patriarchalism.”

Even though women in Germany got the right to vote and the eligibility to stand for election in 1918 equal of rights for women have moved a long way down a road which is far from being completed. Not earlier than 1957 a law on equality of rights was introduced into the German Civil Code. By this law the women’s movement succeeded in repealing traditional juridical conceptions of the superiority of men over women, which were mainly characterised by the laws on marriage. Up until 1957 there was a legally determined obedience paragraph for women in the marriage ceremony. The law relating to the property between husband and wife was formed to the advantage of men and men even had legal control of the children.

The duty to keep house for the family was a legal obligation for women until the reform of the family law in 1977. The legal privileges of married couples and of men within the marriage can still be seen indirectly in the taxation system. As the welfare system is based on the family (not the individual) the incomes of wife and husband are combined for taxation. According to the “Ehegattensplitting” (splitting of the spouses) the partner who is earning more is granted reduction while the partner who is earning less pays comparably high taxes. This means that it is less attractive for the partner who earns less to have a job and as a rule these are the women. At the same time this taxation system plays an important part in the public contributions to families, much more important than child allowance.

The German constitution formulates in article 3, 2 GG that men and women have equal rights. But with the developments mentioned above in mind it is no surprise that this statement was completed by the intention to promote equal rights for women as late as in 1994. Today the German constitution says: “The state promotes the actual realisation of equal rights for men and women and works towards the abolishment of existing shortcomings.” It was constitutional reform as a consequence of the reunification which gave reason to add this supplement to article 3, 2 GG.

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163 Schunter-Kleemann 1992, 201f.
165 Stark & Regnér 2001, 140.
166 “Der Staat fördert die tatsächliche Durchsetzung der Gleichberechtigung von Frauen und Männern und wirkt auf eine Beseitigung bestehender Mängel hin.”
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FRANÇOIS MABILLE AND CORINNE VALASIK

The French welfare state and religious actors

FRANÇOIS MABILLE, TRANSLATION SOPHIA K. ACORD AND LINA MOLOKOTOS LIEDERMAN

To explain the French situation it is necessary to introduce the idea of *laïcité*. *Laïcité* asserted itself over several generations through a variety of collective movements, before voices emerged who shaped these ideas into specific legal forms. One of the key goals in this process was the restriction of the Church’s right of interference in the affairs of the State.

*Laïcité* justifies itself by means of a long-term movement, which has taken place in the West for many centuries. Western populations have been motivated by a search for political autonomy and tolerance, which often overrides institutional positions. The relation between the various layers of the social system is, therefore, somewhat different in France from that which is found other countries.

**The emergence of *laïcité***

In France, the separation of Church and State is part of a prolonged period of struggle. Beginning in 1880, relations between the Church and State were influenced by various legislative measures, which all moved towards the direction of “laïcisation.” As a result, the obligatory observance of Sundays and religious holidays was repealed by the law of July 12, 1880. Religious distinctions in cemeteries were forbidden by the law of November 14, 1881. Seminarians were obliged to do a military service for one year.

Above all, the Third Republic affirmed the State’s prerogatives vis-à-vis religion in two domains: education and the religious orders (*congrégations*). The law of March 28, 1882 instituted the laïcisation of primary education, eliminating religious instruction in the curriculum. The State also wished to control the religious orders, which were not part of the Concordat and which played an important role in education. In March 1880, the government dissolved the Jesuits (*la Compagnie de Jésus*), and obliged non-authorised orders to seek approval within three months.

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1 The notion of “laïcité” is specific to the French language and cannot be directly translated. “Laïcité” describes the political and legal aspects of the separation between the French State and Churches established in 1905. Although associated, it remains distinct from secularisation or laïcisation. As a result, the French word will be retained throughout this paper.
Twenty years later, the law of July 1, 1901, which recognised the right of associations, became extremely restrictive towards the religious orders; authorisation was now required for all orders who were subject to dissolution by the government. In practice, therefore, both the existence and activity of religious orders became subject to the will of the State.

Following the breakdown of diplomatic relations between France and the Vatican in July, 1904, the law of December 9, 1905, resulted in the separation of Church and State. This separation remains marked, however, by a “gallican” spirit; the State retains a certain amount of control over Churches through restrictive organisational regulations.

State, Church and religious organisations

The law of 1905 sets forth two sorts of principles, old and new. On the one hand, this law asserted the liberty of conscience and worship, both of which have been recognised since the French Revolution; the law grants to the State an active, protective role in the free practice of worship.

On the other hand, this law terminates the Concordat system and the *articles organiques* instituted at the beginning of the 19th century, which officially recognised the existence of different faiths and financed their ministers’ salaries. This means that religions are no longer recognised by the State. It does not mean, however, that the State completely ignores religions, nor does it preclude the State from retaining some sort of links with religious communities. As a result, the State no longer provides financial support to religions in the form of salaries or subsidies, a restriction which is also applicable to local communities (departments and communities). But this does not prevent the State from granting financial aid to Churches and to other associations for non-worship based activities (those, for example, of a social or cultural character). Additionally, this law covers expenses for chaplaincies.

Furthermore, the law of 1905 contains detailed arrangements regarding the assets and furnishings used for worship and for the associations responsible for their management. It is normal that the State legislates in this domain, since these issues concern the end-use of these assets (ownership, utility, maintenance). However, the religious associations that were created within this framework pose a real problem. It is foreseen that they will organise themselves “by conforming to the general organisational regulations of the religion for which they are responsible.” This very necessary point is added in order to reassure Catholics. If the State can dictate the creation of these associations, it must take into account the specificity of each religion and respect its particular rules. The problem arises notably for the Catholic Church because of its hierarchical structure, and in principle, this solution seems satisfactory. However, other arrangements concerning this question are less appropriate. Several associations could be created for the practice of the same type of worship, each of them claiming assets. This situation can occur in the case of
differences or even schisms within a Church. As a result, it would pose a grave problem for the Catholic Church, which can admit only those associations that are in communion with its hierarchy. It is, thus, the Catholic Church that would have to decide between competing associations. But the law states that this is up to the Council of State (Conseil d’Etat). This somewhat vague situation is worrying for the Catholic Church, as it allows an organ of the State to decide on a question that should fall within the competence of the Church.

There is another problematic point concerning the organisation of religious associations themselves – associations which aim to “provide for the expenses, maintenance, and public practice of a religion.” The law of 1905 foresees that these associations are created in accordance with the law of 1901 on associations. However, it subjects these groups to additional constraints: in particular, they must be organised within the framework of communities (communes), without taking into account the specificity of each denomination. This system is unsuitable for the Catholic Church, which is organised in dioceses and parishes, and where authority is exercised by bishops and priests. It could also lead to fragmentation, or even division, and strike a blow to the unity of the Catholic Church and its hierarchical structure. It is important to note, finally, that all meetings of religious associations were subject to prior authorisation; places of worship are not allowed to house any political activity.

Following the separation of Church and State in 1905, religious practice had been classified like any other voluntary activity. Since 1905, the Republic “does not recognise, fund or subsidise any religion.” However, religious associations are subject to the financial control of the Ministère de l’Économie et des Finances. Finally, religious orders are subject to a mandatory legal authorisation.

The question of common values

Beginning with the separation of Church and State, the dichotomous nature of French society becomes ever more pronounced. Faced with the apparatus of the Roman Church complete with its hierarchy, its missionaries, its congregations, and its means of evangelisation, the secular camp constructed its own advocates, its own meetings and their decisions, and its own apostolic corps. Hence two opposed powers, two adversarial approaches and two parallel philosophies, each expressed in similar places and each concerned with the common good. Their confrontation occurs mainly in the educational domain, but this is not the only possibility.

The aim of replacing the Church was expressed through an investment in moral education. The goal was the creation of a common morality, unifying the nation’s divisions. These decisions were characteristic of secular militants, but they also appeared elsewhere. The ambition was to compete with the Church, to surpass its effectiveness in the moral domain. And so was born a secular morality, a morality without God, which established itself in the public school system. A morality that was founded on the exclusion of God: God had been eliminated from school
curriculum and programmes, God divided the French people and was associated with extreme and retrograde views.

Today this philosophical and political approach is strongly contested by incoming populations who belong to a non-Christian religion. In France the struggle between the State and the Catholic Church has come to an end through a *modus vivendi*, a consensus which in many ways represents an acceptance by the Catholic Church of retreat to the private sphere. Newer populations, however – especially followers of Islam – are challenging this liberal conception of religious membership. In the name of human rights and of religious liberty, Muslims manifest their religious identity, notably through the wearing of religious insignia even in the public sphere – i.e. where religious neutrality has been strictly enforced throughout the past century by the absence of religious signs (clothes, religious objects etc.).

What is less well known or is less often discussed is that this programme was applied right across the social domain. To the laïcisation of schools was added the laïcisation of hospitals, founded on both the birth of modern medicine and the emergence of a new professional body: a hospital medical staff, best exemplified by nurses. The Catholic Church, which had a quasi-monopoly in this domain, experienced strong competition. Nonetheless it succeeded in maintaining a real heritage in this field, notably in the social sector and in the care of elderly people.

Today, the consequences of spiritual emptiness are evident, affecting both the realities of everyday living and the manner in which problems are approached. This spiritual emptiness does not, however, have its origins in *laïcité*. Complex factors have contributed to this social transformation, such as the power of money and the economy in evaluating activities. Moreover, individual autonomy is no longer counterbalanced by interdependent social links. The ideal of a secular morality, which enthused the militants of the first generations, has also been impeded. Faced with these upheavals, the Church continued without an adequate response. Being secularised, its discourse is no longer plausible: sexual ethics and bioethics are without doubt the areas of debate in which the Catholic Church is most criticised.

The consequences of the situation are serious if there is to be an effective debate about religion in French society. In many respects the Church has been disabled. A modern, pluralist society implies, however, that no one should be condemned to a marginal existence. More specifically, reciprocal respect requires that believers are not considered as persons whose religious sentiments either reveal a failure of emotional stability or a need for a largely irrational, consoling function. In the French case, however, one of the protagonists in the debate has sought to monopolise morality and impose its rules as a condition for an open exchange. The collective dimension of religious affiliation has no place, at least on the official level. This form of *laïcité* perceives the dilution of religious communities as a positive factor; the affirmation of such communities is not perceived as a benefit. This contradicts the goals of Islam. Muslims are conscious that they must not follow the path taken by the Catholic Church.
The contemporary understanding of the separation

We will now try to describe the evolution of the relationship between religious liberty and laïcité, by considering two of its main aspects: the first is the development of a more active concept of the State’s neutrality, which encourages public authorities to create more concrete conditions for religious liberty. The second lies in the fact that, despite this evolution, the secular State retains a somewhat restrictive conception of religion.

The law of 1905 presents a certain number of problems today. The separation is both one-sided and incomplete. For example, it is the State that decides no longer to recognise faith communities. However, it did this without consulting the Churches in question. The separation was enacted in unfavourable circumstances and within a conflict-ridden climate that still exists today whenever the State and religious actors enter into negotiations. This was the case in 2004, concerning the report from the Médiateur de la République (State mediator) on the wearing of religious symbols at school, which was aimed, without any explicit mention, at the Muslim population.

At the same time, separation is incomplete, in so far as it is limited to removing State recognition and financial support from religious groups. Nevertheless, the State involves itself quite considerably in the regulation of faith groups, with the risk not only of restricting their free exercise but of being suspected of anti-religious intentions. One such insinuation was made in 2004, when the French Minister of the Interior decided to organise an “advisory body representing Islam,” becoming therefore both judge and judged in obliging Muslim associations to unite under a single advisory board, thus making them accountable to their members. It was the State furthermore who decided which organisations could participate in this advisory body.

The law of 1905 concerns only religious groups and their exercise of worship, presuming that religion could be so reduced. Moreover, the French State is very embarrassed when it has to deal with congregations or non-traditional religious actors – those that it calls sects.

Separation and neutrality

Laïcité was not instituted in France all at once, as in the United States, but in two stages, which gave it two somewhat distinct forms: (a) a legislative laïcité, established by the law of 1905, that is defined by the separation of Church and State, and (b) a constitutional laïcité, following from the Constitutions of 1946 and 1958, characterised by the neutrality of the State and religious liberty. We can thus distinguish between laïcité as separation and laïcité as neutrality. These two forms are not mutually exclusive, but nor do they share the same meaning. Laïcité in the Republic, asserted in 1905, signified that the State was entirely separate from religion and that it would evolve along its own path. It became a true modern State, serving the general interest. Laïcité also signified that religion was no longer part of the public sphere of the State, passing to the domain of civil society. Here, religion
achieves full liberty and can develop without any obstacles. Religion becomes wholly devoted to its own activities, without seeking to influence the State or obtain protection from it. However, this conception presents a problem: where are the limits to the activities of the Church? Catholicism has social implications – social Catholicism; and nowadays, Islam also has intentions and actions which are aimed not only at believers but also more extensively at the global organisation of society. French laïcité is not well prepared to respond to these challenges.

The challenge of globalisation
As many have observed, globalisation presents numerous paradoxes for its participants. Thus, the competitive nature of a globalised economy encourages the deregulation of exchange and contributes to the reduction of the capacity of the State to regulate both internally and internationally. However, as Saskia Sassen notes, the globalisation of finances and services is organised in a network of strategic sites that are partially anchored in national territories. Furthermore, multinational enterprises, which act on a global scale, require guaranties of property and contract rights, which they expect to find in states. In this respect, states remain actors, which establish the rules. This contradiction not only demonstrates the interrelation between different globalisations. It also indicates that the interaction between globalisation and the State has an impact at each of these two levels, altering both through this process. The globalised economy is stimulated, which, in turn, increases the pressure towards a reduced role for the State in this competitive game. However, this dynamic also has consequences in the economic sphere. The pressure of competition which stimulates the globalised economy produces knock-on effects through the restructuring of enterprises or the delocalisation of production units, which in turn lead to social turmoil and calls for the growing intervention of the State, i.e. to insist in the international scene on rules of conduct, which take into account both social and other norms, and which must be followed by all actors. The State, then, must respond to the decrease in its economic legitimacy, by exerting a parallel pressure in an opposite sense, i.e. in favour of its re-legitimation in social matters. This is the crisis of the welfare state.

The welfare state in France – an overview
It is important to begin by characterising the welfare state (in France called Etat-Providence). The French system of social protection today consists mainly in a system of National Insurance. Due to this fact, France generally falls under the “Bismarckian” family of welfare states, referring to the laws of social protection introduced by the German chancellor at the end of the 19th century. As in other Western European countries, and in contrast to Anglo-Saxon and Nordic countries,
in France social allowances are first and foremost intended for workers and their spouses and children, and distributed in the form of pensions for retired individuals, daily indemnities in case of sickness and benefits for the unemployed, proportional to the salaries of the insured person. They are funded by contributions from employers and wage-earning employees. Social allowances are managed in funds controlled by an administrative board, principally made up of representatives of the employees and employers. Social security funds and the majority of other systems are bodies separate from the State, but the State remains the decision-making authority in all matters of membership and benefit. However, in France there are in addition a number of allowances and non-contributory benefits, often described as elements of national solidarity. This domain includes, on the one hand, family allowances which cover all French citizens regardless of their professional status, and on the other hand, policies which cover those who do not have access to allowances from the National Insurance system (i.e. minimum wage/RMI, other forms of social protection, and universal health coverage/CMU). One of the most important changes in the last 20 years has been the considerable development of the latter element, leading more or less to a dual system of social protection.

**Structural reforms**

Indeed if one pays close attention to the institutional evolutions in the system of social protection, there is evidence of considerable structural reforms, not least in most Western European countries. In France, without a doubt, this type of transformation in social protection is very advanced. Indeed, innovations were introduced in the French system of social protection, notably the creation of a minimum wage (RMI) at the end of 1988, the creation of a general social contribution (CSG) in the late 1990s, and the institution of an annual review of the law relating to Social Security since 1996. These measures have (a) altered the profile of the French system, introducing allowances based on need and no longer on status (RMI, CMU), (b) changed the mode of financing the system (taxes combined with the CSG rather than social contributions), and (c) weakened the power of social partners to the advantage of the Parliament and Government.

During the 1990s, increasing numbers of experts and reports have pointed out that the particular nature of the system of social protection in France could be the cause of the social and economic difficulties that are occurring today. In other words the French system of social protection has become one of the causes of the crisis. Social insurance does not protect those who cannot contribute, i.e. those who are in greatest need; instead the French system of social protection, organised around work, reinforces categories of social exclusion. At the same time, financing through social contributions increases social costs, which themselves encumber businesses, hindering their ability to be competitive and hire new employees. The French system of social protection, largely financed by social contributions, seems moreover to encourage unemployment. The institutional characteristics of this
system, and particularly the participation of social partners in the management of the system, acts as a form of resistance to necessary reforms; joint institutions of social protection prevent the adaptation of the system to new economic and social conditions. These analyses call into question the system itself. They suggest the need for reforms aimed at changing the very structure of social security.

It is in this context that several debates have taken place: debates on the reduction of the working week, debates concerning the privatisation of public enterprises of general interest, and debates regarding the boundaries between the public and private spheres. It is also in this context that the question of private and public actors has emerged with respect to health and social care – socio-religious actors are central to this debate.

The crisis of the welfare state

This is the crisis that was noted by Jean-Louis Laville, for example, in the framework of an international research project on the welfare state and social services, notably in relation to services towards the elderly. According to Laville, we have moved from an authoritative or protective State to a regulatory one. The State does not lose its powers but rather these powers are transformed and new relations are created, based on a logic of negotiation and compromise with various partners, but within the limits of a particular cultural history:

In this contemporary period of ‘crisis’, the collapse of earlier modes of public action encourages research into new paradigms. Indeed, this period testifies to the constraints generated by earlier socio-political interventions and the reorientations envisioned through multiple exchanges between those responsible for public action and external networks, that is, in the recourse to experts or reflections on social experiments. International comparison places the accent on a national coherence inherited from history. Present configurations, however, combine this society-based logic with international exchanges that are increasingly influential in the modelling of national regulations and the elaboration of national and local regulations. In the end, the advent of a new society-based paradigm for public policies that are required to deal with socio-economic problems, constitutes one of the major questions raised by services to the elderly. The content of this paradigm and its construction appears primarily linked to the judgements, interests, and ideologies of those principally responsible for public policies in this domain, to their previous modes of intervention, and to the modes of selection of expertises and experiences upon which they rely. (…) Whatever the case, from this international comparison two bodies of teaching distinguish themselves from the accepted wisdom regarding changes in social services. As far as associations are concerned, the idea that is sometimes advanced, that they would favour a withdrawal of the State is not confirmed by the empirical data. (…) As regards the welfare State, it is not possible to speak of the State’s disengagement from finance (…) Rather than the disengagement of the State, it is more appropriate to speak of changes in public regulations, which are manifested particularly in the crisis of the protective State.3

Consequences for religious actors

These conclusions are particularly important as they confirm the cultural variations recorded in the ongoing investigation of religious actors in the national setting of the welfare state. Specifically, our research is situated in an extension of Laville's theories – and in two respects. Religious actors are henceforth partner-actors of the State, by virtue of their voluntary status in the domains of health and social care. Whereas Laville is interested in the evolution of the State, we are interested in examining the consequence of this evolution on religious actors. While Laville studies voluntary actors, we introduce a comparison between religious and non-religious voluntary actors. With this in mind, it is necessary to re-insert the political and religious transactions into a specific economic and social context, in order to study both the identity transformations of religious actors, themselves linked to the crisis of the welfare state, and the strategic opportunities which as a result are presented to these actors. Distinguishing themselves from the majority of associations, religious associations have placed themselves in a particular space and have made specific claims – “The Church is a world” wrote Emile Poulat – which also constitutes a space for allocating appropriate resources. In the system of negotiations and transactions between voluntary actors and the regulatory State, religious actors introduce a disruptive element, concerned primarily with the recovery of meaning, amidst a general economy of game theory where the losses of some sustain the gains of others.

In fact, this system relies on equilibrium of “regulation” (on the political side) and “compromise” (on the religious side) which meet around the notion of governance, within which religious actors are in fact quite strong petitioners. As noted above, the system presents numerous inherent ambiguities with respect both to the complexity of regulatory processes and to the diversity of challenges and strategies among actors. The sociology of organisations, which complements the approaches of the social study of religion, enables the integration of actors in a study on national and regional public policies towards the religious; or otherwise put, it understands and surpasses the assumption of the State as the main actor. Among other merits, this choice avoids the relativisation of certain French problems such as laïcité, which do not directly concern our subject (the French State does not support religious groups, which does not mean that it cannot aid religious associations of general interest). Laïcité needs to be seen in a more global context of religious regulation, no longer played out simply at national level. Indeed, we have to include in any research with a European aim, factors which takes place at the level of international (United Nations) and European institutions, not least the capacity of religious actors to play a role in the normative production of action.

Production of identity

Normative identity production, which concerns for example the right to religious liberty, the right to cultural difference, the right of minorities, or again the “right of
access to meaning,” was recently proposed by certain Catholic circles at the European level. This normative identity production, within a larger perspective, includes two aspects: both the possibility given to individuals to discover their own religious heritage (evidenced by the Franco-French controversy over the religious heritage during the elaboration of the Charter of Fundamental Rights for the European Union), but also the recognised ability to produce meaning in international policy construction, itself suffering from an ethical crisis. Such was – and is – the meaning of the program “A Soul for Europe,” which aimed to mobilise actors associated with the great spiritual families for the European cause.

Yet, equally, the normative production of general interest – if one accepts the French assertion that the European Union speaks for “European interest” – aims to justify the subsidies distributed by the government to religious actors the moment their action pursues an action in the general interest. Here, Europe is again an interesting case study. One recalls that many religious NGOs were present in the two collectivities of French associations, which lobbied during the development of the Charter of Fundamental Rights. The collectivity Article 1er was directed by a priest, Antoine Sondag (the former head of JEC international and the French commission on Justice and Peace and the current director of the Catholic Europe du Secours), and included among its members Christian Action for the Abolition of Torture (ACAT), the Catholic Committee against Hunger and for Development (CCFD), and the Secours Catholique. The other collectivity, alongside the ACAT and the CCFD, also included ATD-Quart Monde, the CRIF, and the Fédération Protestante de France. During the process of elaboration of the European Charter on fundamental rights the following were also consulted: the Diakonisches Werk des Evangelischen Kirche in Germany, the Evangelische Kirche itself, the Commission des épiscopats de la communauté européenne, the Convention of European Churches (CEC/KEK), the European Justice and Peace Commissions, la Fédération des associations familiales catholiques en Europe, and the European Forum of the Orthodox.

At the level of the Council of Europe, in the list of NGOs authorised to deposit collective complaints bearing on the European Social Charter, figure the International Catholic Association of Services for Young Women, Caritas Internationalis, the International Movement ATD-Quart Monde, and the Quaker Council for European Affairs.

Socio-religious actors

In the European context, France often appears as a singular case. The notion of laïcité in itself constitutes a symbol of this particularity. However, an approach which views religious actors as one kind of social actor allows some qualification of this singularity, and if it does not make it more common, it at least permits a finer comparison with the situations in other European countries. Indeed, under different forms, religious actors appear as social actors, and as such, are encouraged
to work with public authorities. Transactions and compromises result from this, which relate to the organisation of these religious actors and which also concern their identity.

The case studies outlined below do not limit themselves to Christianity but reflect the diversity of the religious identities now present in France. They demonstrate how religious actors continue to play a social role that is often overshadowed or even ignored by religious authorities, despite the fact that the context of deregulation demonstrates their particular contribution.

This is the reason for us in France to work in two topic areas using a comparative perspective:

A) A study on religious orders engaged in health and social care. The 207 religious orders, which emerged from the 1994 census, enable us to measure on a national basis the institutional investment on the part of religious orders in the field of health and the increasing place of voluntary associations in the management of this sector. A material on this will be shortly introduced below.

B) The case study on religious actors also identified as social actors in the town of Evreux. This town, whose rural environment had been marked by the presence of missionary Brothers, offers extremely rich empirical material, and permits the identification of Christian, Jewish, and Muslim religious actors.

Religious orders in health and social care

In the health sector, the religious orders manage 161 organisations, containing 12,476 beds, among which there are 419 private clinics and private hospitals (9,882 beds), and 92 convalescent homes and centres of rehabilitation (4,194 beds). To these organisations should be added: six centres of nursing care/community clinics, two centres for the training of health personnel, and 135 associations concerned with the management of these health facilities. The sector dedicated to the elderly includes 510 organisations (30,394 beds), within which there are 419 retirement homes (29,945 beds), 145 home care nursing services (449 beds) and 250 associations with responsibility for management in this sector (there is a certain margin of error in these figures, due to several incomplete or inexact responses). Finally, the social sector covers 304 organisations containing 16,896 beds, of which there are 89 children’s homes (4,277 beds), 38 hostels for young workers (2,540 beds), 100 hostels for handicapped adults (5,312 beds), 23 protected workshops (1,261 places), and 180 associations involved in the management of these social organisations.

These figures, significant in themselves, demonstrate that religious sisters, today as yesterday, are involved closely with people and populations, and are active in confronting the "phenomena of growing poverty and social exclusion, in order to provide better and more appropriate responses."

Their involvement is deeply rooted in the conviction that it is important for the Church to continue to offer a social service that takes into account a Christian vision.

4 See the “Déclaration des Supérieures Majeures” from the 1990 General Assembly.
This considerable institutional investment is reinforced by the activities of both individual nuns and groups of nuns in civil or non-religious organisations, where they work alongside their secular colleagues either as professionals or volunteers. Both contributions, institutional and individual, are important in order to accomplish the Church’s traditional mission of charity towards those excluded from society.

The study is interesting in multiple ways. In order to manage these organisations, religious orders create associations, which are in permanent dialogue with public authorities. Thus, interesting links emerge with other countries (Germany for example), which are close to this configuration. A general analysis of these organisations permits us to understand the challenges and transformations in the lives of religious actors. These derive, for example from management structures (are these secular or religious?), the existence or not of a management association, and the existence or not of a ‘statement of purpose.’ Against which criteria are individuals hired? What is the role of the chaplain within the organisation? What are the links with the local Church? How is the Catholic identity of an organisation created? The analyses of these issues, carried out by the religious orders themselves in recent years, are particularly fruitful.

### Social work and Catholic identity

A survey was carried out 1999 among secular directors of Catholic organisations concerned with health and social care. For the analysis of this survey, analytical elements will be used that derive from an earlier survey (November 1995). The survey conducted in 1995 by the health service of the CSM on the Catholic identity of health and social organisations run by religious orders permitted an analysis of responses from 190 organisations (representing around 20 percent of the total organisations, as of the 1994 census). The last question explicitly asked the respondents to discern in the life of the organisation, where and through what ways they would be able to find some sort of Christian witness, and how in general, this identity might be constructed.

This question produced extremely varied responses. Certain responses indicated, some in an exclusive manner, the witness that came from the presence of nuns or a religious community within the organisation. In similar vein, certain respondents insisted on the presence of a chapel, the celebration of mass, the presence of a chaplain, or even the existence of visible signs, such as the name of the organisation or a statue of St. Joseph in the reception area. From this perspective, the disappearance of the religious community is often felt to be the “death” of the organisation’s particular character.

Other responses emphasise (or add to previous responses) the existence of a mode of conduct specific to the organisation, without necessarily linking this to the presence of nuns. They speak, rather, of a particular “spirit,” of an “ambiance,” and of an “atmosphere,” which testifies to the values of a warm welcome, respect, tolerance, a

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5 Mabille 1998.
peaceful environment, concern for the poor, etc. This way of acting, if it is not specifically Christian, is deeply rooted in recognised gospel values and is concretised on a daily basis in attitudes to individuals, and in the quality of care and relationships.

Finally, other responses are not concerned so much with reporting a particular atmosphere or history of the organisation, but seek to reflect on the conditions in which this can be renewed or maintained. It is these responses, which manifest the greatest concern for the future, by reflecting on the participation of the whole staff. These responses insist among other things on the manner in which the personnel work, on the quality of the team as a whole, on the fact that the institution involves a caring community of concentric circles, and on justice for the personnel and residents. They also reveal the importance of a partnership between personnel in the elaboration of a statement of purpose for the organisation, in the need to make explicit shared values, and in the formation and reflection on the history and charisma of the institution. These responses also underline the necessity for places for ethical reflection, for confrontation with Christian teachings, and for a networked exchange with other institutions of the same type, etc.

Three possible types of future Catholic institutions

In the course of the analysis, a hypothesis was formed regarding the existence of three types of institutions – the model of the religious order, the model in mutation, and the partnership model – which largely depend on the degree of participation of secular individuals and members of personnel in the definition of the organisation’s goals. We have sought to examine to what degree the conditions conducive to the creation of a common spirit are present – a spirit which is faithful to the origins of the organisation and which could be shared with secular individuals (indeed delegated to them) and if possible with the whole of the personnel. These three models thus correspond to the evolutionary phases in the stages of an institution which must be more and more concerned with transmitting and invigorating its “spirit” and the manner in which it operates – all things, one supposes, that are deeply rooted in the Christian tradition and particular ways of thinking.

In order to determine these three types, the following data have been considered as pertinent, although no single piece of data is necessary or sufficient to classify an organisation as a given type. The following elements thus serve as criteria:

- The structure of the leadership (secular or not),
- The existence or not of a management association,
- The existence or not of a statement of purpose,
- The degree of collaboration between different personnel in the elaboration of this statement.
- The existence or not of a network of organisations reflecting regularly on the charter and common values,
- The criteria for hiring a director and his links with the order,
• The presence or not of a group of organised volunteers,
• The role of the chaplain in the organisation,
• The links, more or less, developed with the local Church,
• The criteria for hiring and training personnel,
• The nature of the responses provided to the question regarding the discernment of Catholic identity.

The classification of organisations into models was completed following the reading and analysis of the questionnaires from each organisation. This classification is to a certain extent arbitrary but verification was possible, at least in part, by taking into account the coherence of each group with respect to the preceding criteria.

The three models appear within an evolutionary framework. The first model corresponds to a situation almost unchanged from the point of view of a partnership with secular bodies. The second corresponds to a situation of mutation and change and the third to a situation of real partnership, which seems to assure the best conditions for the perpetuity of the founding charisma even in the absence of the religious order. The models progress in the sense of a greater collaboration with secular bodies and greater openness to the outside, in particular to the local diocesan Church and other organisations of the same type.

On the whole, the criteria identify the significant features. They mark clear differences between the models. Certain criteria seem to be more pertinent than others as the percentages corresponding to each model reveal. Thus, the presence of a statement of purpose (respectively 19 percent, 39 percent, and 87 percent) and the fact that this statement had been developed or is in the process of being elaborated with the participation of personnel (4 percent, 39 percent, and 73 percent) are two strongly significant criteria. These results seem to confirm that the dynamic created by establishing and effecting the statement of purpose is an important factor in the evolution of organisations. During the survey, the creation of a statement, though obligatory for the last several years, had not been accomplished in the majority of cases (41 percent had a statement, 21 percent were in the process of creating one). Another highly significant criterion corresponds to the presence or absence of another organisation from the same congregation or spiritual family (4 percent, 16 percent, and 40 percent respectively). This last finding reflects the result concerning statements of purpose – the presence of a network reinforces the dynamic of participation and reflection on the fundamental values of the organisation and their implementation.

Numerous survey questions aimed at gathering the opinions of organisation directors on the future of Catholic institutions, whether they work in the domain of the elderly, health, or social issues. They indicate different foci regarding which factors can or cannot assure the Christian identity of these organisations in the future: for example, the type of legal affiliation with the Church, the necessity or not of the presence of nuns or priests, personnel training, the existence of an organisational culture, the necessity or not of ensuring certain specific practices,
judgements on the difficulties which await these organisations in the future, given
the demands of users and public authorities, etc.

The manner of responding to these questions depends on the way in which each
respondent envisaged the future of the Church, and, in particular, what vision he or
she had concerning the relations between Church and State. Catholic institutions
are places of contact and mediation between the community of believers and the society
of which the institutions are part, and to which they wish to offer a service. The
judgement on the future of institutions run by religious orders in both health and
social care can be represented in a schematic form (and thus necessarily
caricatured) in three scenarios.

These scenarios are linked to different ecclesiological visions, depending on
whether one considers the role of the Church, for example, as one of distributing
sacraments to the faithful and spreading the word of God to the world, or of
testifying to the love of God by offering a service to the poor and society in general,
or perhaps of creating a brotherly community of prayer, etc. If one places greater
importance on the missionary dimension of the believing community, institutions
become important places for contact and for the evangelisation of culture and
society, with all of the risks and compromises that this entails. On the other hand, if
one is more sensitive to the dimension of sanctifying those already baptised and
consolidating the ecclesiastical community in the face of a world perceived as
hostile and dangerous, health and social institutions do not appear as priorities,
except where they are linked to a counter-cultural testimony and or where they exist
primarily for the service of believers.

In the next 20 years, the institutional participation of the Church could be
described by one of the following scenarios:

The “communitarian” scenario
In this hypothesis, the sole activities recognised as Catholic institutions would be
those marked by an ecclesiastical legal control, by an evangelical culture, by their own
practices, or by a link to the support of the Christian community through religious
personnel or other involved Christians. They would have a strong community
character with a “clientele” that is primarily Catholic or that accepts the specificity
of the organisation, and a leadership and personnel almost exclusively Catholic or at
least in agreement with the fundamental ethical principles. These institutions would
be places of testimony in a world, which is dehumanised and “despiritualised.”
They will place themselves directly in the service of the Church’s mission.

In the questionnaire, this vision reveals itself by answering ‘no’ to the question
on whether secular persons are capable of ensuring the Catholic nature of an
institution, ‘yes’ to the question on whether the legal guardianship of the institution
by the Church is vital for recognising its Catholic character, ‘yes’ to the question on
whether an institution cannot remain Catholic if it has a substantial minority of non-
Catholics in its management structures, ‘yes’ to the same question on the presence
of a substantial minority of non-Catholics among the personnel, ‘no’ to the question
on whether the residential bishop should not closely follow what goes on in a
Catholic institution concerned with health care, and ‘no’ to the affirmation that maintains that it is not necessary for all members of the association’s Conseil Administratif (CA) to be Catholic, etc.

The “secular” scenario
In this scenario, the Church will not need, and perhaps would not be able to, be involved in these institutions. This could be justified by many reasons, each of which relates to a different vision:
- By the inevitability of compromise or important obstacles in the retention of a particular identity,
- Or, because it is not the primary role of the Church to spread the Word of God and distribute the sacraments,
- Or, even, because it is the best means of meeting “men of good will” without frightening them too much.

Whatever the case, the practical consequence is the secularisation of institutions of Christian origin. Christians, as individuals, have entered the structures of the world in the service of man, without needing to create their own structures. It is about being the “yeast in the dough.” Catholic institutions will be able to continue their existence, but without a strong link to the Church. They will be perceived as having roots in Christian culture, but not as structures of the Church, nor as having a strong specificity.

In relation to the questionnaire, these responses are evidently the inverse of those which were given in the preceding scenario: no strong legal link, no necessary presence of religious persons, no need for a Catholic majority, no strong link with the bishop, and no Catholic majority in the CA, etc.

The “mixed” scenario
This scenario predicts a continuity of present practice. Catholic institutions will be characterised by a tight association with Church organisations (religious orders and dioceses) but will offer a public service in a pluralist society. They will live with the ambiguities that will arise by having roots both in the secular and ecclesiastical worlds, and will continue to live with tensions that stem from differing and sometimes contradictory expectations from their different sponsors and owners. This scenario also assumes the development of partnerships not only with local communities, but also with Christian and public institutions of the same type. The partnership with secular bodies will be equally vital for the transmission of an appropriate way of acting.

The general results demonstrate extremely strong convictions from those surveyed on the fact that Catholic identity resides in the culture of the organisation (94 percent), that these institutions distinguish themselves through their own practices (87 percent), that they are essential to the Church (94 percent), and that it is important that they be deeply rooted in the local Church (91 percent). The majority seem to think that Catholic identity does not reside in the fact that
organisations are controlled by the Church (71 percent), even if a legal sponsorship is vital (62 percent). Opinions, however, are more qualified with respect to knowing whether this legal sponsorship will be sufficient to assure the Catholic character of institutions (56 percent); on the whole, respondents indicate that sponsorship is important but not sufficient.

Although institutions would remain clearly Catholic with a non-Catholic minority in their management structures (84 percent), with a substantial non-Catholic majority among their users (87 percent), and with a substantial non-Catholic majority in their personnel (76 percent), those surveyed are clearly divided on whether such institution could remain Catholic with a non-Catholic majority in its management structures (51 percent). It is clear that Catholic identity does not reside in the substantial presence of nuns of priests (87 percent) and that an institution can remain Catholic while wholly dependent on public funds (88 percent). On the other hand, 90 percent of respondents think that the number of Catholic institutions will have diminished in 20 years, and 52 percent think that these institutions will be likely to have a less Catholic character.

Concerning the necessity for laymen to receive special training appropriate to the vocation of their institution, 66 percent think this is necessary for those who are Catholic and who have a leadership role, (75 percent in the case of non-Catholics); yet, only 32 percent think this is necessary for Catholic members of personnel, (34 percent for non-Catholics). If these results indicate an awareness of reality in terms of the diversity in personnel, it is also important to ask about the continuity or even the existence of an organisational culture in the absence of staff training to ensure this.

As for the probable future for the next 20 years, it is clear that public authorities will tend to exert more control (83 percent), that this will pose more dilemmas than today (63 percent), or new dilemmas (81 percent), that the considerations of users’ preferences will be more important (89 percent), and that users’ opinions will pose more challenges than today (81 percent). In any case, the Church’s financial support will not be more important (97 percent), and the number of priests and nuns will diminish (95 percent). Anxiety towards the future is evident.

Regarding the questions about the role of local Churches, 96 percent of those surveyed, on average, think that it is important that these institutions be deeply rooted in the local Church, but only 51 percent are of the opinion that it is important that they belong to the local Church or order. Concerning the role of the Vatican, 38 percent think that Rome will have a more important oversight concerning practices and research in Catholic institutions in the future, while 72 percent think that the Vatican will not need to do this.

In the light of these results, one can conclude that the communitarian scenario has little support among those surveyed, and it is very likely that the “mixed” scenario will attract the greatest approval. It is clear that organisation directors are attached to a solid link with ecclesiastical authorities (local rather than “Roman”), but in practice it will be necessary to work within the constraints of a secularised and pluralistic society. In the meantime, the continuation of this analysis will demonstrate that it is necessary to qualify these affirmations, as differences appear in the nature and importance of

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legal control, staff training, probable secularisation, and the role of lay people. On
the whole, these surveys indicate considerable anxiety among directors with regard to
the future, in view (amongst other things) of the power of control exerted by public
authorities.

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Situation and policies regarding gender

CORINNE VALASIK

Women and men in French society

Although France likes to define itself as the country where there is a “French tradition of relationships between genders, marked by courtesy and gallant manners, integrated into the republican universalism,” it is a patriarchal conception of the male/female relationship that has dominated for centuries. The man has been the head of the family, making decisions for the whole unit. The woman looked after the home and the children, but had no power over their education.

The first claims for equal rights between men and women only date back as far as the French Revolution (1789), and met with little response: the Code Civil of 1804 legitimates the principle of the civil incapacity of women, who were first under the authority of their father, then that of their husband. Male politicians feared the consequences of a female vote, which they believed would be quite conservative, close to Catholicism.

Women obtained civil citizenship during the last war (laws of 1938 and 1942), and the right to vote in 1944. Two years later, equality between genders was included in the Constitution. Since the Sixties, women’s and family rights have undergone significant changes: in 1965 the woman was freed of marital tutelage and in 1985 total equality of spouses was implemented for the purposes of asset management.

The issue of inequality between men and women has only been debated by the general public since 1997. Despite the fact that the feminist movement has long been looked upon with suspicion in France, country of universalism, it has nevertheless grown. During the Fifties, feminists demand equality before the law. Dissatisfied with the answers received, they abandoned this reformist approach a decade later and opted for a revolution of society as a whole. Nowadays, the legalist tradition is returning, dealing particularly with problems such as rape, harassment and violence. Feminists wish to see the laws fully implemented.

Legal regulations promoting equality between men and women

The questions of equality between men and women have never been so present in public discourse in France as today: all, leftwing, rightwing, employees and employers, say they are concerned with this matter. Professional equality was even the theme chosen for debate by the Medef (employers’ trade union) in 2003. So measures

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7 This code has made its mark on a large part of Europe.
8 Ergas 2002.
taken are recent and are the result of a real political desire for change. But despite this willingness, we observe that when laws are not constraining they are rarely applied.

At political level:
On the 28th June 1999, Parliament passed a constitutional reform which gives equal access to electoral mandates and elective functions to both women and men. Thus France is the first country in the world to pass legislation which permits parity. This reform is a real cultural revolution. The law passed on the 6th June 2000 obliges political parties to present 50 percent female candidates at legislative elections, or risk financial penalties.

These new regulations were applied during the municipal elections 2001: the number of female municipal councillors has almost doubled in towns with over 3500 inhabitants, 47.5 percent compared with 25 percent in 1995. However the number of women mayors is still low, less than 7 percent, as well as that of women senators (10.3 percent) and deputies (12.5 percent) – the law does not not have jurisdiction over these elections. France ranks thirteenth in the European Union for the number of women elected to the Parliamentary Assembly and is last but one for the Senate.9

The topic of a specificity of the feminine vote is a subject of controversy in France. It seems women tend to vote for those men who declaring their policies to be pacifist, who are closer to contesting parties, and are more reticent to the extreme rightwing.

At economic level:
Women are almost as active as men in the labour market (45.9 percent of working people in 2002) but they are still under-privileged compared with men with comparable qualifications. The employment rate of women aged between 15 and 64 was 55.8 percent in 2002. However, the type of work this refers to differs greatly: in 2002, 29.7 percent of working women had a part-time job, compared with 5.1 percent men. 83 percent of part time workers are women. The unemployment rate amongst women is higher than for men but the gap tends to decrease as men are more affected by the crises in industry than women.

The jobs that women do are to a significant extent those requiring a level of qualification (36.5 percent are in executive and intellectual professions) but remain concentrated in the tertiary sector. Girls are increasingly highly qualified but this is not reflected in executive jobs: only 7 percent of women hold a managerial position in any of the 5000 biggest companies. The average gap in salary between men and women is still 21 percent, the greatest difference being among executives. Figures for part time activity are mainly made up by women: presented as a choice, it is often a constraint as it limits progress in career and income. The same applies to new types of jobs which involve working at home and are often poorly paid and do not permit complete autonomy. 47 percent of women have short-term contracts. For this reason, women often take retirement later than men (30 percent ask for it at 65 compared with 4 percent of men) and often have a lower pension, as they have not

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9 Sineau 2002.
accumulated the total number of points. Women receive pensions which are on average 42 percent lower than those received by men.10 The rate of activity of women in the labour market declines with the arrival of children, although to a lesser extent now than in the past. There is a social disparity: it is mainly executive women and those with intermediary professions who turn to paid child minding solutions, even when their children are of school age. The number of weekly working hours has decreased for all with the introduction of the new laws, but in fact the time worked by female executives has increased by 25 minutes per week while that of men has decreased by the same amount.11

The status of immigrant women is most worrying: men are far more likely to obtain work than they are, mainly in the building sector. Integration into the professional sector is difficult for both men and women and the rate of unemployment amongst immigrants is double that of non-immigrants.

To deal with these inequalities, political measures have been taken: The Roudy law of 1983 requires companies to make an annual comparative study between men and women. A report on this law, ordered by the socialist Prime Minister Lionel Jospin in 1998, shows the lack of attention paid to this legislation. The law Génisson, passed in 2001 reinforces social debate on professional equity in business firms.12 They are not required to solve the problem of inequality, but at least to take it into account and to aim at getting closer to parity. The matter of professional equality is now supposed to be negotiated between employers and trade unions every year. However, very few companies do this. This law is augmented by one against discrimination.14 The employee is still obliged to provide evidence showing he was subject to discrimination, but it is now the task of the employer to prove the decision was founded on objective, non-discriminating criteria.14

Warranty funds for women’s initiatives have been in existence since 1989. When a woman creates, develops or re-launches a company, the State acts as guarantor with banks. In 2002, only 29 percent of this type of company was headed by a woman and average company life is not as long as those headed by their male counterparts.

At social level:
Since 2000, contraception has been seen as a right in France, and parental authorisation is no longer necessary for minors. Nearly 75 percent of women use contraception (in 2000, 48 percent take the pill, 16 percent have a coil, and 8 percent use condoms).15 Since December 2001, the provision of emergency contraception for minors in pharmacies or in secondary schools (under certain conditions) has been free and anonymous. The number of abortions continues however to increase (212,000 total in 2002), especially amongst 18–24 year olds.

10 Enquête Emploi, INSEE, 2002.
11 Enquête emploi 2002.
14 Since 2001 a free phone service has been available.
15 Enquête coco 2002.
Women are under-represented in decision making bodies. Amongst those women who belong to any given association, only 14 percent sit on the board. They are very active in Parent-Teacher and Pensioners associations while men are more involved in sports or activities related to their profession.

On average women spend 2 hours per day more than men on household tasks. The same difference is found in the time spent taking care of the children. In order to promote the role of fathers for their children following the birth, paternity leave was instituted in January 2002: it accords 11 consecutive days. The employee is then no longer paid by his employer but receives an allocation from the state.

At educational level:
Since the 1950s, girls have caught up with and overtaken boys as regards levels of academic achievement. Now the differences are no longer to be seen in numbers obtaining a diploma but in its value. Men and women choose different orientations in the school system. Fewer girls follow scientific studies (38.5 percent passed a scientific baccalauréat – the high school exam – in 2002), the most highly esteemed in France, but more study literature (71.3 percent), languages, pharmacy and some follow medical studies. What is more, when a profession becomes more feminised it is perceived to lose value and is progressively deserted by men (teaching for example). Men benefit more often from higher education than women, which contributes to career moves.

Measures have also been taken by the government: In February 2000, a convention was signed in order to “implement an overarching policy of equal opportunities between girls and boys, men and women in the educational system”. It is a matter of “improving the scholastic and professional orientation of girls and boys,” “to promote an education based on respect of the two genders” and to “strengthen the tools for promoting the equality and training of the players.”

Family and individual rights in taxation and social entitlements
The individualisation of social rights is a recent phenomenon in France. The Social Security system implemented after the Second World War referred to the traditional family model, where the head of the family meets the needs of his wife and children. As the woman did not work she was without any social rights of her own. Since the Seventies this model has been very much debated. Nowadays, Social Security works with a definition of two types of families: the family with dependents and the single parent family based on the notion of isolation.
Health insurance is related to professional activity conditions (including unemployment) or belonging to a family/couple. The implementation of universal health insurance now gives a minimum level of individual insurance to people outside this framework.

Pension is calculated according to the previous income of the person. Some adjusting elements exist for women (e.g. maternity). When one spouse dies, the other receives a widows/widowers pension. As life expectancy is longer amongst women, it is mainly they who benefit from it.

Both married couples and single people are taxed according to the following scale:
- one share per adult (single, partner, married, divorced)
- 0.5 share per child, 1 from the third child on.

Family allowance/child benefit is accorded to the person who has the effective, permanent care of the child: couple, single parent, legal representatives other than parents.

The State implements social minimums though individual allowances which aim to fight all forms of exclusion: the minimum income guarantee (RMI) gives each person aged over 25 a minimum income;20 52 percent of those receiving this allowance are women. Other financial aids include the specific solidarity allowance, the income allowance, the widow’s allowance, the handicapped adult allowance. 98.9 percent of recipients of the single parent allowance are young women with a child under the age of three, it gives a minimum income.

There are as many men as women living below the poverty line, but over the age of 75, the proportion is four women to one man, women living seven years longer than men. Two-thirds of those benefiting from the old age minimum income are women.

Gender and welfare in public debate

France has been late in tackling the gender issue in its research. There are a number of reasons for this:21
- refusal to consider that norms of gender are social constructions and that the body is a place of power. The gender order is considered a natural order.
- refusal to approach questions of gender in public as they risk revealing hidden inequalities thus not in line with the French democratic and egalitarian ideal.
- confusion between the notion of gender and that of communitarianism.
- studies carried out by militant feminists, commitment often appearing suspect.

French society is based on the notion of citizenship, which is principally a legal, abstract notion, enabling the conception of equality between unequal individuals. Particular characteristics (regional, ethnic, religious, sexual etc.) are part of private life; individuality is opposed to citizenship and its universalism. Welfare is

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20 Younger if there are dependent children.
21 Fassin 2004.
expected to give individuals decent living conditions in order for them to invest fully in their rights and duties as citizens.

Citizenship transcends all particularisms. Any claim to take into account a particular characteristic is thus seen as a communitarian tendency questioning the very foundations of democracy, that is to say the universal and therefore citizenship. Admitting concrete inequality between men and women, or even just talking about gender, meant adopting a pro communitarian logic, as it implied differentiation between citizens.

This French peculiarity can also be observed in historical research. The history of women is part of the more general field of social history, ruled by liberal and at the same time Marxist views, "associated with irreligion and masculinity". This generalising perspective held back the development of gender studies which was seen as being too particularistic. Nevertheless, historians of religion are beginning to favour this research topic, entitled the religious history of the female, over their usual focus on the history of the Church and the decline of Christianity in France. This epistemological difference can also be observed in studies on nuns. Unlike in North American research, French historians and sociologists pay little attention to links between nuns and feminism. It is the unusual aspects of women’s devotion that are observed, leading these researchers to enrich their studies with the use of psycho-analysis and spirituality. A few studies deal with the internal functioning of congregations, but where nuns stand in the working world, and how they take their place as women in society has hardly been developed. Likewise, most university studies on welfare do not mention the existence of unequal relationships between genders.

The arrival of the left wing majority in 1997 changed the situation. The modernisation of customs was at the core of its programme of action. The Pacs (Pacte Civil de Solidarité, Civil Pact of Solidarity) gives rights to unmarried couples, homo- or heterosexual, and sets up rules concerning the practical problems of any couple’s everyday life. The French then realised many inequalities still existed, affecting the whole population concerning adoption and inheritance. The law on parity between men and women in politics marks a turning point. Gender is presented as a permanent anthropological fact in accordance with the citizen’s universalism, and not as a particularism. It is only after the introduction of this debate to the general public that the concept of gender imposed itself in universities and also gradually in the media. Statistics in France now include gender and this has become a core topic of discourse for society. The political measures taken, especially in social protection, now take into account the question of gender. It is only now that France has discovered the question of male/female inequality and its consequences for society. This also explains why the theoretical conclusions of French Feminists (Hélène Cixous, Julia Kristeva and Luce Irigaray) were, for a long time, more renowned in other countries than in France.
Political actions

The four government priorities concerning equality between men and women are:

- Parity and access of women to posts of responsibility
- Professional equality between men and women
- Access to rights and respect of the individual’s dignity
- Management of the stages in life

The government aims to fight against stereotypes and prejudice and implement a real democracy.

The matter of violence against women has been seen as a national priority since 2001 with the announcement of a governmental plan of action. After its late entry into public debate this topic is fast becoming a central political issue. La Marche des femmes des cités (The Suburban Women’s March) made visible the violence suffered by women in under-privileged districts. The women are asking for social ‘mixed-ness’ and a ‘de-ghettoisation’ of the suburbs, seen as the origin of problems in these districts. At the same time, the publication of national statistics on violence against women showed that one woman out of ten, in all social classes is beaten. Finally, the death of the actress Marie Trintignant in August 2003 as a result of battery. set this problem centre stage in national debate. Numerous consultations between the various parties have been set up to find solutions, such as obliging the spouse to leave the marital home. Concrete results are still awaited and shelters for battered women are overcrowded.

The fight against discrimination in employment is also an important topic with the adoption of a law in 2001 relating to this problem. All forms of harassment are also noticeably present at the current time.

Prostitution has been one of the priorities of the Minister for the Interior in 2003, who has maintained an abolitionist stand. The private act is neither repressed nor forbidden, but soliciting, passive or active, is illegal, as is pimping. The question is therefore one of reducing the number of prostitutes and fighting against this illegal activity. In one year their number dropped by 40 percent in the capital but they have taken refuge in the suburbs in conditions even less tolerable than before. With less police surveillance (and thus indirect protection), they are now on their own. Associations have trouble finding them.

Women and men in the welfare sector

During the thirty years, from 1945 to 1975, welfare, when that term is used as the “Etat-Providence” (Providence state) and quest for well-being and comfort, has structurally modified French society.

26 Following the death of Sohanne, 17, burnt alive in October 2002 by youngsters in her neighbourhood because they did not want to see her any more, the movement “Neither whores nor suppressed submissive” (“Ni putes, ni soumises”) organises an annual walk across France from February 1st to March 8th.

27 Beforehand, the statistics on violence only took into account the figures given by Police Stations and hospitals.
The domestic family universe changed completely: dwellings grew considerably in both size and number. White goods and collectivisation of the work of socialisation (nurseries, old people’s homes) freed the woman of part of her chores, enabling her to have an activity outside the home, mainly in the tertiary sector. The number of women employed thus doubled between 1945 and 1980.

Thanks to the welfare process, women have gained autonomy in relation to their spouses and the institution of marriage while gaining protection against any possible risks (divorce, death, sickness etc.). Not only do they benefit from welfare services, but they work mainly in that field, which enables them to reconcile their private and professional life: 50 percent of women working in the social and medical sectors work less than 35 hours per week (compared with 12 percent in other administrations or in private enterprises).

This dependence on the welfare sector makes women more vulnerable in periods of economic crisis, they are more affected by budget restrictions and are progressively relegated from the working place, as are immigrants. The Parental Educational Allowance encourages young women often with poorly paid jobs to leave the work place in order to look after their child. Set up in 1985, it gives an allowance to the parent with caring responsibility. In a way, it is a kind of unemployment benefit. This type of support for family responsibility often leads to disaffection with work.

Specific measures have been implemented to help women looking for jobs. Thus le Plan national d’action pour l’emploi (the National Plan of Action for Employment) fixes quantified objectives involving women: they are helped mainly by the employment solidarity contracts (64 percent) and the consolidated employment contracts. All the same, they benefit little from measures in the overall job market. Only 28 percent of girls profit from contracts of aid to young poorly qualified people in companies, which have been in existence since Summer 2002.

According to M. Ferrand: “We can set up a ‘Providence State’ that favours autonomy for women in opposition to a ‘Macho State’ which allows inequalities between genders to flourish elsewhere.”

Church influence on the roles of women and men in society

For a very long period of time religious and political powers in France shared the same vision of the role women play in society. Women were considered to be naturally passive: owing submission to their father then to their husband, and totally devoted to domestic tasks. The family was the basic cell of society and the Church, the woman should play her part in order for both to run smoothly: “The axis of their religious life, like their social being, must be their status as wives and mothers.”

After the French Revolution (1789), the political field became independent of the
religious field, which did not engender any modification in the status of women. Male politicians monopolised the new channels of power and kept women in their minority role, whereas the Church pushed women into social action, in the hope of reinforcing the power of Catholicism in society. The religious education of girls became a vital stake “in the conquest of souls.” Institutions for poor young girls and convents were founded. The proposed role model being that of the Virgin Mary: virginal purity for young girls and maternal devotion. The second half of the 19th century marks the apotheosis of the relationship between the Church and women with the revival of the Marian cult (pilgrimages, devotions).

While carrying out these charity and educational functions, women pursued their maternal vocation: nourish, nurture, educate. However, these demands by the clergy involuntarily permitted Catholic women to take responsibility outside of their homes. They were considered allies of the Church and their infractions as to sexual morality were mainly seen as their husbands’ fault.

When the State decided to professionalise education, health and aid, the Church opposed the promotion of women’s work, even though women entering these sectors were considerably influenced – unconsciously – by Catholic values. Public education was primarily to train future wives and mothers, or to “model them to become apt to invest themselves in feminine professions where they serve others.” Male politicians developed a family-based policy where the role of women was hardly different from that proposed by the Church, apart from its view of sexuality.

From the middle of the 20th century on – a period when the Roman Catholic religion lost its hold over society – the role which the Catholic Church wanted women to play began to differ more and more from the role they held in French society. Disagreements mainly concerned the question of sexuality. Catholic women progressively distanced themselves from the Church and those who were faithful and church going felt free not to follow papal orders on this matter.

Thus the Catholic conception of woman, man and society has very strongly influenced French society. At present, in a society undergoing many changes and with the emancipation of women, the hold of the Church has become weak.

The notion of gender is today a debated issue in the Church of France. According to Monsignor Dubost, Bishop of Evry-Corbeille-Essones since 2000 and president of the Episcopal Commission of Catechesis and Catechumenate, the gender theory “justifies the individual construction of one’s sexual personality as one wishes, the roles of men and women being interchangeable.” He approves of the apparent aim of this thesis, i.e. to remove the dominant-dominated relationship, but considers the real challenge to be elsewhere: it is to accept differences in equality, instead of denying differences for the sake of equality. Dubost thinks the French Revolution explains the refusal to consider oneself as a sexual being: “The
revolutionaries certainly rejected social inequalities but, founded a new egalitarian
order based on nature, they turned the natural differences between men and women
into an issue of a difference in dignity?"37 Men and women may have different
bodies, but their “soul” is the same.

The role of women in the Church

Alongside a conservative message, the Church of France has contributed to the
evolution of women’s role in society. Firstly by demanding the woman’s consent in
order for a marriage to be valid.

Secondly by offering the possibility of a religious life for those who wished to
free themselves from their family: religious congregations enabled these women to
enjoy economic and social autonomy until death, and spread a new image of
women as active and responsible, even if they were limited to a certain type of
work: healthcare and education.38

Later on, Catholic youth movements, such as Young Working Class Catholics
(J.O.C.), Young Rural Catholics (J.A.C.) etc., offered young women new modes of
action and reflection, enabling them to play an important social role.39 In the
philanthropic sector, they enjoyed relative freedom: innovating, implementing
actions which can afterwards be seen in the Nation-State (solidarity economy,
women’s autonomy …) “Everything happens as though authoritative power is much
more flexible in economic and political areas than in the erotic.”40

French bishops implicitly broke free from the 1968 Humanae vitae encyclical,
by making it clear to couples that the decision concerning contraception is theirs to
take.41 Opposition was indirect but existed nonetheless. At present, some French
bishops approve of the condemnation of abortion but regret the manner in which it
is often undertaken. They refuse to judge these women who are trying to solve a
difficult problem. According to them, the Church should be satisfied with this
expression of a desire for procreation, and offer answers: educate young people,
help pregnant women, develop adoption procedures, stimulate an attitude of respect.

Concerning women’s social role, the French episcopate wishes them to take a more
active part in the debate concerning the reduction of working hours. Society today
reduces social identity to professional identity to an exaggerated extent. “Whether it is
due to culture or nature, many women don’t expect the same from work as men do, and
I find it appalling that feminists believe work not only to be a synonym of freedom
(which sounds obvious) but the single source of identity. They should have the
opportunity to be mothers while still having a career.”42 In France women are the main
carers for people in need: children, the elderly … This need for assistance will rise

37 Dubost 2002, 18.
38 Langlois 1984.
39 Voyé 1996.
40 Maître 2004, 205.
41 Sevegrand 1995.
42 Dubost 2002, 76.
Welfare, Church and Gender in France

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steeply in years to come. Knowing women are rarely paid for this kind of aid, solutions must be found for them to avoid being monopolised and to enable them to gain recognition. In the same way, women with children should receive more assistance (e.g. child minding). It is not about distributing allowances but about providing an income, in other words considering maternity as an activity just like any other.

A feminisation of the Church of France has already begun. Most parishes have pastoral councils in which women play a great role. Their activity is focused on the neighbourhood, everyday administration, catechesis (in 1996 90 percent of the catechists were women), and training. They support methods based more on participation than hierarchy. Even though a few women have become theologians, army chaplains, or are in charge of the finances of some diocese, most of them occupy traditional positions, and what’s more, they are most often “invisible.”

The place lay people (laics) occupy in the Church also defines this trend. More and more present in the Church, they are kept out of positions of power and “the discourse concerning the official religious truth.” The Church of France admits that its discourse concerning women is out of date, and doesn’t effectively portray the work they do. Some French bishops aim to symbolise this movement, to give it a public voice, fighting against Catholic conservatism in these fields. The Social Commission of the Bishops of France firmly supported the law on male/female parity in politics, seeing in it a chance for democracy. Since January 2004, a woman, Marie-Caroline de Marlène, has been head of communication for the Conference of the Bishops of France. A mother of four, she was previously an executive in a big company, Paribas. She has been chosen to build a bridge between the institution and the outside world, to show that the Church plays an active role in the social debate.

Thus, the Catholic Church of France adopts the Vatican point of view on women’s place in society while offering them new responsibilities in practice. As Liliane Voyé rightly wonders, does “this correspond to a real institutional opening up or is it a solution for the lack of priests,” is it an answer to a void or a true wish?

Female authoritative power and Catholicism

In conformity with the pope’s position, the Church of France refuses access to the priesthood to women. The issue is rather, according to them, one of accepting the feminine nature of the Church, as a source of life and hope, to take inspiration from the feminine way of living the religious life, “with hospitality and friendship, fidelity, memory of the heart, life experience in its fragility, capacity to find the sources of life.”

As for the laics’ claims, they mainly concern priestly celibacy, the possible ordination of married men and of women deaconesses. The movement Femmes et Hommes

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46 Dubois, 160.
en Eglise (Women and Men in Church) works for the recognition of parity in Church. In 2003, in collaboration with the Saulchoir Dominican library, this group set up a research and documentation unit on gender in Christianity. The association Plein jour (Full Daylight) brings together women sharing their lives with priests, who must all stay undercover. In 2004, a television program and interview with a priest’s son brought to light the situation of these men leading a double life.

Some French bishops think married men could be made priests. A poll published in June 2000 in the weekly magazine La Vie shows nine out of ten French church-going Catholics are in favour of a Vatican Council III dealing particularly with women’s place in Catholicism, the laics’ place, the ordination of married men and the dialogue between religions.

The lack of interest shown by the laity for the issue of women’s authoritative power in the Church is partially due to the link between feminism and Catholicism in France. Florence Rochefort distinguishes three waves in this relationship: the first one at the beginning of the 20th century avoids the questions of religion or politics so as to maintain solidarity amongst women. However, the strong conflict between Catholicism and the Republic helped to sharpen the feminist position. As many, women had to be freed from the Catholic authority. The second was highly influenced by Simone de Beauvoir and began to criticise the core functions of Catholicism. This stage enables a “move from militant critiques to the conquest of theological knowledge, thanks to feminist conquests.” Finally, the third wave aims at “rebuilding the plurality of women” in religious texts, in other words to re-think the relationship between women and religious life.

The Church of France is less disturbed than other movements by the activity of organised feminists, Catholic women do not claim much from the Church. According to Danièle Hervieu-Léger, this can be explained by their classic Catholic socialisation which leads them easily to accept their role as auxiliaries to the clergy. In reality, the absence of priests leaves them with almost total freedom of action. Far from being one single unit, Catholic feminism in France is made up of numerous movements, their disagreements having recently come to light in the debate over whether or not to accept religious veils in state schools.

In France there are few studies of feminist theology and those that do exist have still not found an echo in the catholic hierarchy, which they contribute to render a historical relic.

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47 The association has 500 members among which 200 are priests’ partners, and 2 bishops’ partners.
52 Lautman & Maitre 1998.
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Welfare, Church and Gender in Italy

ANNALISA FRISINA

The Italian welfare system

According to the main scholars in the field, the Italian welfare system is a conservative/corporativist or a social-capitalist regime. It is characterised by a passive or reactive type of social policy, which de-emphasises direct state intervention and stresses the need to moderate the harmful outcomes of market forces. Its focus has traditionally been on cash transfers to support families, rather than on direct provision of services. The Italian welfare state has been strongly characterised by the principle of social insurance based on labour-market participation.

The most significant part of national interventions against poverty depends on the tributary position of the beneficiary, thus excluding a large amount of citizens who are faced with a difficult situation precisely because they do not participate in the labour market. Expense flows are therefore beneficial only for a minority of the most needy citizens. Even today Italy, unlike many other European countries, does not have a homogeneous measure for income support at national level for all citizens in equal state of need, not even for minimum standards.

In Italy rights of citizenship and the definition of citizenship itself vary from region to region and from ‘commune’ (local authority/local council) to ‘commune’. In an essay upholding the necessity of introducing a Minimum Entry Income also in Italy Saraceno argues that “the devolution on a local level of most assistance services, without prior definition of criteria, standard rights and minimum duties on national level, or of adequate financing, has produced as a result, besides interesting phenomena of innovation at a local level, an increase in the levels of discretion, and hence also the weakening of the shared conditions of citizenship.” All this has historical roots in corporativism and is reflected in the status-differentiating nature of social insurance. Social rights have generally been linked to class and status, and the capacity to reduce income inequality has been very modest.

A further crucial element of this regime has been the commitment to the defence and maintenance of the traditional family. The strength of familialism in Italy (and in general in other southern European countries) has led certain scholars like Ferrara (1996) to distinguish it from other conservative regimes (of continental

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2 Sainsbury 1999, 17f.
3 Ferrera 1999.
4 Benassi/Mingione 2003, 92.
5 Saraceno 2003, 46 (my translation).
6 Boeri/Porot 2002.
Esping-Andersen (2000) suggests that the differences actually involve only certain specific features: the scarce initiatives of “defamilialisation” (i.e. the measure in which a person can maintain an acceptable standard of life independent of his/her family) by the social state, and the higher levels of welfare responsibility resting on families in Mediterranean regimes. Mingione (2000) also suggests taking into account the particular economic system of Mediterranean countries, which is characterised by an extension of informal economy and autonomous work.

Social insurance protects the family against the disruptive impact of the market by giving some benefits to the head of the household, the breadwinner (normally adult male wage-earner). Family members have been covered but have typically lacked individual entitlements. Wives have been entitled to benefits only when they become the head of the household through the death of the husband. Responsibility for the poor (among them many divorced or unmarried mothers) has been decentralised and given to families, private initiatives and charity organisations.

### Table 1. Welfare responsibilities of Italian families.

<table>
<thead>
<tr>
<th>% of elderly living with their children (first half of the 80’s)</th>
<th>Young unemployed living with their parents, in % of the total (1991–1993)</th>
<th>Weekly hours of non remunerated work (care labour) by women (1985–90)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>39</td>
<td>81</td>
</tr>
<tr>
<td>Sweden</td>
<td>5</td>
<td>-</td>
</tr>
</tbody>
</table>

According to the catholic principle of subsidiarity which postulates that all parts of the natural order have specific tasks in order to sustain the stability of the larger whole, the state does not interfere in the distribution of responsibilities and its function is to facilitate and guarantee that the lower social organs perform their duties and uphold the capacities of individuals and social groups in their social environment. In other words, the state is expected to guarantee that families can manage their responsibilities by helping them only when and where necessary.

Sainbury, as other feminists scholars, emphasises the importance of the tax system as an instrument for promoting preferred types of families and relationships within the family. Italian tax schemes have generally favoured a family unit consisting of a husband (breadwinner), wife, children, and possibly members of the extended family. The assumptions are the following: men secure income; women are only marginally present in the labour market; the family is the prime provider of care, which is a woman’s responsibility; family allowances provide supplements. Such images of the gender division of labour and the nature of the family have reinforced typical male and female employment careers. The Italian welfare state has discouraged female labour-force participation not only through tax disincentives, but also through explicit policies which encourage women to leave the labour market, typically after marriage or birth of the first child.

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1 Esping-Andersen 2000, 112.
3 Sainsbury 1999, 185–209.
4 Sainsbury 1999, 19.
Today Italian social policies are inadequate and inconsistent especially as regards young adults, single parents and the elderly, who are primarily dependent on resources available within the extended family. There are immense regional variations in local labour markets, and local policies and resources vary in important aspects. For instance, local authorities have the power to choose the minimum of childcare services and the other social services that are to be offered. This discretionary power delegates two kinds of autonomy to the local level: strategic autonomy (choices, orientations …), and operative autonomy (choice of partners, division and distribution of expenses …). Municipalities influenced or historically dominated by left-wing parties (as in the Emilia Romagna region) are more in favour of women’s right to employment and more likely to regard care as a public and not a private responsibility. Municipalities influenced or historically dominated by centre-right parties (as in the Veneto region, where Vicenza, the town of the Italian case-study, is situated) emphasise the differences between gender roles and see care primarily as a private responsibility and hence as a female task. Certain scholars, writing on this issue, have noted the presence of two conflicting social state models in Italy.

Most social services are publicly funded but performed by non-statutory organisations and the kind of “welfare mix” (the particular blend of state, market and third sector) varies greatly from one local area to the other. As remarked by De Leonardis, it is not only a matter of weights, of dosage of the ingredients in the blend, it also depends on the fact that the third sector is a very heterogeneous field when it comes to the types of organisations, experiences, social actors, etc. The supply of services therefore depends on the relations between local policies and local organisations and on the traditional aims and specialisations of these groups.

There are generally few controls of the quality and aims of the services provided by the third sector. As shown by the case of religious institutions operating in the field of personal assistance, there is still little reflection and awareness of the importance of continuous training of the workers to meet the demands of a task of such social interest. Another problematic issue is that of coordination deficit, which can lead to socially extremely expensive contradictions; that is to say that certain support interventions are doubled while others are completely absent. Moreover, the autonomistic tradition of charity intervention by religious institutions preserves certain deeply seated features which are scarcely compatible with universalistic philosophies of care. The data emerging from a recent national survey on social care services linked to the Catholic church is definitely not

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12 Bimbi 1995, 61f.
13 Bimbi; Pristinger 1985; Donati 1990.
14 By third sector we mean all organisations which are neither profit oriented companies nor public bureaucracies, thus including heterogeneous phenomena like non-profit, volunteer, and non-governmental organisations, self-help groups, foundations, etc. De Leonardis 2002, 32, see also Barbetta 2002; Barbetta et al. 2003 and Dalla Mura 2003.
17 De Sandre 2003, 12.
comforting: almost two thirds of these services are not in the lists compiled by the local administration for the programming of services.20

The most critical position on this issue is De Leonardis’ (2002): he glimpses a continuous risk of “self-referentialism” and “privatism” in the activities of third sector organisations. According to him, the growth of the social market and social activism were not followed by an adequate “intensification of exchanges, bonds, interactions, discussion processes and common projects.”21 These third sector agencies have thus the risky tendency to become bearers of “selective logics based on the principle of ‘merit’ (as an epitome thereof the mention of ‘the deserving poor’) and on the consequent creation of borders and barriers between those included and those excluded.”22

It is necessary to consider that in Italy there are different models of “governance locale”23 (local government) in assistance policies and that the Veneto region (to which Vicenza, the Italian case-study, belongs) seems since the end of the 90’s to have been oriented towards “a fairly radical liberalist logic in which market regulation sharply prevails over public intervention regulation, at the expense of the universality of the rights of social citizenship, but also of the multiplication of social capital as a latent factor of competitiveness. In effect, the massive presence of non-profit organisations rooted in Catholicism and voluntarism, to which most of the provision of regional social services is devolved, still ascribes a fundamental role to the community network, which operates within an autonomous grid circuit, differentiated both from the market and the public circuit.”24

In order to better understand these different regional models, Messina (2001) compares the approaches of the Veneto region and Emilia Romagna and she shows, for example, that there is a sharp difference between the “recipients” of the funding (that is to say the partners) which the Emilia Romagna and the Venetia region choose for their interventions. “While in Emilia Romagna, and in red zones in general, the beneficiaries are almost exclusively the ‘communes’ and their consortia, in the Venetia region funds are equally distributed between local bodies, IPAB, private institutions like non-profit associations, Catholic associations, and even individuals.”25 The scholar adds that this different approach favours the network of Catholic associations operating in the area of socio-assistance.

Messina’s study in fact reveals that while in Emilia Romagna there are no forms of direct funding of the third sector, “the Venetia region invests 40 percent of its funding in associations which have no endorsement from the public sphere, thus detaching regional funding from the very provision of the services by the volunteer associations agreed upon with the public sector.”26

Moreover, analysing regional women-friendly policies enacted in application of law n. 125/91 (“positive actions” for equal opportunities in the working world),

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20 Sarpellon 2002, 222.
21 Leonardis 2002, 89.
24 Messina 2001, 179 (my translation, italics added).
Messina remarks that Emilia Romagna was very active and obtained 7.5 percent of the nationally funded projects against the 4.7 percent given to the Venetia region. 27 Moreover, the two regions also chose different beneficiaries: in Emilia Romagna cooperatives, consortia, trade union associations and training centres, while Veneto gives funds to larger enterprises (of more than 100 workers) and training centres run by religious institutions. Hence a difference also regarding the objectives of these projects: in Veneto they are aimed at professional careers, while in Emilia Romagna there is also an attempt to reconcile “life hours” and “working hours” through forms of part-time work.

This delegation to Catholic associations entails a more traditional offer of social services compared to the more innovative Emilia Romagna. “With per capita costs only slightly higher in Emilia Romagna, relevant differences are to be found in the components of the costs themselves (…). Traditional functions are ‘discretionary, selective, marginalising’ charitable interventions ‘with a tendency to satisfy only primary assistance needs’; innovative functions are instead focused on ‘social rights and aimed at creating a service system open to the general public, also satisfying non-material needs regarding the sphere of psychophysical well being, alongside a main strategy of social insertion. The data depict Veneto as definitely more traditional.’” 28

For example, Emilia Romagna distinguishes itself over all other Italian regions for the highest number of council run nursery schools and preschools, thus providing a widespread network of these services, which are among the most modern and well equipped on a European level. 29 On the contrary, in Veneto there is a higher number of preschools run by religious institutions and nursery schools are generally rare.

The Italian welfare state has not only to face its historical contradictions and its regional disparities, but is nowadays also confronted with new pressures to adjust its social policies to changing demographic, social and economic circumstances. Sundström (2003) stresses the challenges represented by economic state deficits, extremely low birth rates and new types of families, while Sainsbury draws our attention to how a range of circumstances like “ageing populations, changing family structures…slackening economic growth and decreasing job security, unstable employment patterns, financial crises of social security arrangements and changing relations between men and women” challenge the gendered assumptions of welfare state arrangements. 30 This seems to be particularly true for the Italian case.

However, the current public opinion debate on welfare is centred on the issue of federalism and the new “devolution” law which has aroused many concerns. The future seems to haringe even more regionalism and lower levels of economic redistribution, as well as larger socio-economic variations. State control versus local autonomy is relevant to the outcome of local social policies and also to the maintenance or the alteration of gender relations. According to Ferrera and Sundström, in under institutionalised Italy strong social and economic groups

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27 Messina 2001, 175f.
29 Messina 2001, 171.
employ the rhetoric of subsidiarity by defending regional political, administrative and cultural variations in order to preserve social diversity and patriarchy. The lack of state institutions protecting social rights has led to a particularism which allows for considerable variations in citizenship rights between social groups and regions, and the political choices of the current administration have caused many citizens to protest against this neoliberalist version of federalism, which heightens previously existing inequalities.

During the first six months of 2004 there has been an increase in the criticism of the federalist reform desired by the Northern League. The President of the Republic has made several calls for “Italian unity” and public protests have multiplied in response to welfare cuts and the government’s reform project; among the most outspoken critics are the National Medical Association and the National Council of Mayors (A.N.C.I.).

Immigration is another important issue which is currently being debated in Italy. The media often present it as a “matter of security” and thereby a core issue directly related to the crisis of the Italian welfare state system is rarely allowed to emerge. After the last census (2002/03) the immigrant population has been estimated to be about 2,500,000 out of about 57,000,000 inhabitants. If we look at the most recent ISTAT statistical report (final data for the 14th Census, 16/6/04) there are more than 1,300,000 foreign residents in Italy and these are concentrated above all in the North of Italy (61.8 percent), primarily in Lombardy and then in Veneto and Emilia Romagna. The incidence of foreigners in the total resident population is greatest in the province of Vicenza (the city of our case study) with 4.7 percent of foreigners for every 100 inhabitants. Moroccans make up the largest collective group (46.6 percent), followed by Albanians, Rumanians, Filipinos, Yugoslavians, Tunisians, Chinese, Senegalese and Peruvians. Since immigration to Italy is a relatively recent phenomenon there are as yet few foreigners who have been born in Italy (159,060) and these are for the most part minors (86.3 percent). Because the State grants resident visas for the purpose of keeping families together, and in such a way many immigrants join their family members already residing in Italy, immigration has become stable and there will continue to be more and more immigrant children born in Italy.

There are little more than 674,000 foreign women residing in Italy, but at the same time it is recognised that there are large numbers of an undocumented women employed as domestic labourers.

In fact, in elderly assistance a “silent revolution” has taken place: nowadays immigrant women are the main providers of care for the elderly. In terms of the provision of elderly care, Italy is indeed one of the poorest European countries.

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31 Ferrera 1998, 94; Sundström 2003, 41f.
32 On the risks of decentralisation, see also Boeri and Perotti 2002, 106ff.
33 Among the various reasons for the instability of the present Italian government we also find the conflict between the Northern League and the Christian influenced Centre Party (U.D.C.) which, after the recent electoral defeat in the administrative elections by the governing parties, has made itself the voice for the defence of “Italian unity” and is contesting the approval of the federalist reform.
34 ISTAT, The 14th Census.
35 Castagnaro 2002.
In 2001 the Venetia region registered 15,000 immigrant domiciliary assistants, and the estimate is that Venetian public finances save circa 350 billion lire a year: in retirement homes the cost for each of these elderly citizens would have been 27 million lire for the region and 36 million lire for their family.37

In the Vicenza case-study the relevance of this phenomenon will be taken into account and investigation of the connection between immigration and welfare will also be attempted at the local level.

**Table 2. Synoptic table of main characteristics of the Italian welfare regime.**

<table>
<thead>
<tr>
<th>Role of Family</th>
<th>Market</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central</td>
<td>Relations</td>
<td></td>
</tr>
<tr>
<td>Marginal</td>
<td>Corporations</td>
<td></td>
</tr>
<tr>
<td>Subsidiary</td>
<td>State</td>
<td></td>
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</tbody>
</table>

**The Catholic Church in Italy and its role in welfare**

How important is the Catholic Church for Italian citizens nowadays? There is no simple answer, and we will try to stress some issues that complicate the seemingly evident notion of Italy as a Catholic country.

In contrast to what happens in other traditionally Catholic countries, the presence of the clergy in the Italian territory is still relevant: in 1993 there were 37,300 priests, 27,800 members of male religious orders and 134,000 members of female religious orders. However, it has been stressed that the progressive ageing of the clergy is accelerating (64.8 percent of diocesan clergy are over 50) and that “new generations” are lacking.40 Moreover, according to official statistics 90 percent of Italians belong to the church: the large majority are baptised at birth and buried with a religious funeral. However, there is a multiplicity of ways to “be” catholic in this country: “Since the very foundation of the unitary state there have been many cultural, religious and political currents within Catholicism, often denoted by sharp divergences (from intransigent to liberal Catholics, from extremist papists to modernists). These divisions have followed the lines of social and territorial fractures: from peasant folk religiosity to the catholic solidarity of the first workers’ movement, from the liberal Catholics of the enlightened bourgeoisie to the

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36 Sainsbury 1999, 246.
38 Esping-Andersen 2000, 146.
39 According to Esping-Andersen (2000:81) we define as “decommodification” the right to an income independent from market participation. It is a way to specify the idea of rights of social citizenship suggested by T. H. Marshall.
40 Pace 1998, 148 f.
All these divisions increased with time and they crystallised from the end of the 60’s through all of the 70’s in socio-religious, cultural and political orientations which progressively brought to a relative implosion of the catholic “ancien régime,” dominated by the ordering principle of unity, despite diversity, against a common enemy, communism.42

The plurality of the forms of belonging is also related to differences regarding beliefs. As remarked by Garelli, Guizzardi and Pace 45.1 percent of Italians think that “clergy celibacy should be abolished”43 and more than half of the population holds that there is “some truth in all religions, and that Catholicism is not the only true religion.”44

Italian Catholicism can then appear like a “giant with clay feet,” since belonging has more mobile and dim borders than is usually thought.45 Italy continues nevertheless to represent itself as a religiously fairly homogeneous society, so that certain scholars maintain that for Italians Catholicism has been a means to believe in their collective identity: “In the name of the unity of Catholics Italian society represents itself as a unity, while it actually always has been divided and differentiated. In the name of this unity, the Catholic church has been very active in the socio-political field, more intensely so during the Cold War years, in particular to support politically Democrazia Cristiana.”47 This party was founded and established relying on the widespread presence of parishes on the Italian territory, on lay catholic associations like Azione Cattolica, the Catholic Workers Association, the catholic teachers, etc. and it found its ideological reference area in Christian social doctrine, stated in the Encyclical Rerum novarum of 1891 by pope Leo XIII.48

After the fall of the Berlin wall and the scandal of generalised political corruption (the so called “Tangentopoli”), Democrazia Cristiana disappeared and left behind only small parties which appeal to Christian values (Cristiani Democratici, Partito Popolare Italiano, Cristiano-Sociali etc.). Christian associations are on the other hand more active than ever, these groups have covered all sectors of society and has given birth to a “basic welfare”49 which plays an important role in the Italian welfare mix.50

Also Catholic associations shows a plurality of positions and a complexity which actually worsened after the second Vatican Council, an event which brought to many a hope in a different model of the Church, no longer based on hierarchy and obedience (consider Don Milani’s famous phrase “obedience is no longer a

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41 Garelli /Guizzardi/Pace 2003, 297.
42 Garelli /Guizzardi/Pace 2003, 298.
43 Garelli /Guizzardi/Pace 2003, 299.
44 Cirpiani et al. 1995.
47 Pace 1998, 86.
48 Pace 1998, 76f.
49 Diamanti and Pace 2002.
50 Sarpellon 2002. Regarding the Italian debate roused by the social encyclicals by Johannes Paulus II see Pace 1998, 158–160. Concerning the social doctrine of the Church, see Barucci and Magliulo 1996. It is important to remember the contribution of the Theology of Liberation begun in Latin America, whose most eminent figures were Ernesto Cardenal (Nicaragua), Gustavo Gutiérrez (Peru), Camillo Torres (Colombia) and Dom Hélder Camara (Brazil).
virtue” which became a slogan in those years); a hope which seems nowadays still to be unfulfilled considering the “dirigiste pyramidal” – top-down – (Curia, diocese, parish) organisation of the Church.

Nowadays socio-assistance services of Catholic inspiration are tied to the Church in complex ways which Sarpellon has classified as “active co-presence, influence, support, control” depending on the kind of autonomy they have developed from dioceses and the Curia. Connection to the Church obviously grants advantages in terms of resources (access to premises and financial resources) and also a higher levels of attraction and connection in the territory. The current tendency, however, seems to be towards “lay enterprise motivated by religious values, where the Church is less present as an institution, but plays a strong inspirational role.”

The third national survey revealed that socio-assistance services connected to the Catholic Church have increased from 4,089 in 1988 to 10,938 in 1999, hence with a yearly growth rate of more than 15 percent. In the first surveys the most common services were residential services for senior citizens, minors and disabled citizens as well as domiciliary assistance. Nowadays the most common services (more than one fifth of Church-related services) deal with “first aid”: advice bureaus and services of primary goods distribution.

Table 3. Typology of prevalent beneficiaries of Church-related socio-assistance services.

<table>
<thead>
<tr>
<th>Beneficiaries</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elderly individuals</td>
<td>21.6 %</td>
</tr>
<tr>
<td>“Italian individuals and families with problems”</td>
<td>18.8 %</td>
</tr>
<tr>
<td>Minors and youths</td>
<td>16.3 %</td>
</tr>
<tr>
<td>drug addicts and alcoholics</td>
<td>9.8 %</td>
</tr>
<tr>
<td>immigrants</td>
<td>8.9 %</td>
</tr>
<tr>
<td>disabled individuals</td>
<td>8.6 %</td>
</tr>
</tbody>
</table>

These services are more common in northern Italy than in the rest of the country, and this of course means that they are not where they are most needed. It is interesting to note that 57 percent of Church-related services benefit from permanent public financing. Nowadays certain religious institutions devoted to assistance choose a traditional role of charitable action towards “the poor selected as deserving,” while others function as an actual social service with qualified personnel and a financial organisation of their own. It is our opinion that this contradiction is the core of the

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51 See Pace 1998, 133f.
52 Garelli 1991. Regarding Democracy and the Church, see Torres Queiruga 2004. For a critical view on the state of things, go to the website of the Italian section of the international movement “We are Church” for a Church "from below" (www.we-are-church.org/it/).
54 Sarpellon 2002, 40.
56 Sarpellon 2002, 18.
problem and we deem it crucial to face this issue when investigating in the field.\textsuperscript{60} Sarpellon, as a specialist in the field of Church-related assistance services, also enquires about the role of Church-related services and promises he will have an answer in ten years when the fourth national survey takes place.\textsuperscript{61}

Table 4. Lay, religious, paid and non-paid personnel in Church-related socio-assistance services.\textsuperscript{62}

<table>
<thead>
<tr>
<th>Personnel</th>
<th>Lay %</th>
<th>Religious %</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid Voluntary</td>
<td>27.6</td>
<td>0.7</td>
<td>28.3</td>
</tr>
<tr>
<td>Objectors</td>
<td>2.8</td>
<td>0</td>
<td>2.8</td>
</tr>
<tr>
<td>Total Personnel</td>
<td>90.7</td>
<td>5.9</td>
<td>96.6</td>
</tr>
<tr>
<td>Executives</td>
<td>2.0</td>
<td>1.4</td>
<td>3.4</td>
</tr>
<tr>
<td>General Total</td>
<td>92.7</td>
<td>7.3</td>
<td>100</td>
</tr>
</tbody>
</table>

Regarding female presence, women amount on average to 62.7 percent of the lay and 65.7 percent of the religious personnel.\textsuperscript{63}

Nowadays Italian religious pluralism is not only evident within Catholicism, but also involves the presence of other religions. The (scarce) data available indicates that out of 4,500 people interviewed on a national scale only 2.6 percent declared they belonged to a religion other than Catholicism (of them: 0.7 percent Protestants, 0.6 percent Muslims, 0.3 percent Buddhists, 0.02 percent Jewish). But if we consider other sources, such as the yearly statistical report on immigration published by Caritas, Islam emerges as the second religion in Italy.\textsuperscript{64}

There are about 800,000 Muslims in Italy: a small number if we think about the high rank on the agenda in public debate which this is given.\textsuperscript{65} In fact, as in other European countries the Islamic presence in Italy is socially constructed as a problem, not only because of the “global war against terrorism,” but also for what is termed “national reason.”

Pace’s (2004) analysis of the Treviso case-study, in Veneto Region, shows the paradoxes and tensions of the current situation: there is an open conflict for control of a symbolic capital called “collective identity” in which the mayor of the Northern League party, even if he is not an official representative of the Church, is called to “defend Catholic values put into question by the arrival of Muslims” and the local bishop who, instead, inasmuch as he represents the Church, acts as spokesman for a universalism of values and basic rights, including the right to hold religious services and religious freedom for Muslims. “It is as if there were a conflict over the definition of Italian collective identity. Among those who are deeply rooted in the Catholic concept, that is, a safe haven in which to withdraw to defend oneself from

\textsuperscript{60} Consider criticism by de Leonardis 2002.
\textsuperscript{61} Sarpellon 2002, 43.
\textsuperscript{62} Sarpellon 2002, 33.
\textsuperscript{63} Sarpellon 2002, 192.
\textsuperscript{64} Garelli 1991.
\textsuperscript{65} Fondazione Agnelli 2004.

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each and every internal and external cultural contamination, and those who, instead, maintain that Catholicism, though being the moral foundation of identity for Italians, should not become a barrier which impedes every form of acceptance and dialogue with other cultures. The differing lines which emerged among Italian bishops regarding this show how the dispute has involved the different voices present in the Italian Church. The social-cultural frontier in this case also became a socio-religious frontier demonstrating how Islam could act as a catalyst for the tensions and polarisations which already existed. These already existed inside the Catholic Church and were probably expressed in discussion of other themes and subjects, as for example, the model of the Church that would be possible in a secular society where practising Catholics had become a minority.66

The Italian case-study will keep into consideration this analysis in order to understand better the heterogeneity inside the Church at the local level and the consequences of its praxis in the social economy.

Situation and policies regarding gender

In the 70’s women undertaking high school education were 36.3 percent against 49.1 percent of men. Thirty years later a “leap forward” has taken place: women have reached 89.8 percent against 89.5 percent of man. In the 70’s only 9.2 percent of women studied at university and in the year 2000 this has become 40.4 percent (against, respectively, 14.8 percent and 31.2 percent of men). Today they are not only better educated than men, they also achieve better results. For example, the rate of female high school students who repeat a year is 4.5 percent, while, in the case of men the figure is doubled, 8.9 percent. As a consequence of the remarkable increase in female education documented by this ISTAT data, female labour force has become qualitatively similar to that of men. Nevertheless, while the differences in the rates of activity between single men and women considerably diminished compared with past figures, the gap between married men and women is still substantial. Even today, looking at the figures for married couples between 20 and 50, almost all husbands are in paid employment or are looking for a job, while one married woman out of two is a housewife.67

The rate of activity for Italian females is still the lowest of the 15 European countries included in the comparison, although Trifiletti invites us to relativise this data “for we have an estimated ‘underground economy’ of around 30 percent of the Gross Domestic Product,” but also “because of the ingrained cultural habits, and customs of fiscal opportunities, which make them consider themselves to be non-active.”68 The growth of “atypical” work increased female participation in the working

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66 Pace 2004, 114f.
68 Trifiletti 2003, 121 (my translation). It should also be kept into account that the number of inactive and unemployed women who wish to work is among the highest in Europe (Rubery et al. 2001 in Sundström 2003).

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world, but there are some who wonder if maybe after all “these new forms of work can be seen as a mere legalisation of ancient and still prominent habits of completely underground work.”69 In contrast to the impact in Northern Europe of part-time work, flexibility is often synonymous with precariousness, it does not seem to help reconcile work and family, and above all it does not guarantee a sufficient level of social rights.70

There are considerable differences in female labour market participation depending on educational background.71 Women attaining decision making power roles are still a few: they represent only 1.3 percent of the administrative executives in Italy’s five largest companies. Regarding politics, female presence in the Chamber of Deputies is only 11.5 percent and in the Senate it sinks to 8.1 percent.72

Studies of time-management prove unambiguously that female participation in the work market does not entail an equal distribution of family work.73 The “double presence” model (meaning full-time family work as well) is still the most widespread, with some variation depending on the level of education: 94 percent for those less well educated, against 84 percent for women with a higher level of education.74

Young Italian women criticise the gendered division of labour within the family as well as the consequences of the loss of an adequate national family and social policy.75 Faced with a sharp trade-off between maternity and work outside the house, Italian women often renounce having children. It is the so-called “low fertility balance”: if women are forced to dedicate many hours to housework due to lack of alternatives, they necessarily have to invest less in their careers. But nowadays more and more women aspire to economic independence and to stable participation in the working world. The trade-off which formerly forced them home, nowadays spurs them to have fewer children.

In a conservative/corporatist/social-capitalist regime female employment is regarded as a private rather than a public matter.76 However, social policy choices still inevitably influence working women: it is sufficient to mention the lack of public services for infancy, school time schedules which are inadequate for mothers with a full-time job, the fiscal system of direct family transfers (e.g. income taxation on an individual or family basis), and the juridical regulation of female work which actually discourages it.

Compared to social-democratic Northern European states, the Italian State has never had the role of “main employer of women” through “woman-friendly policies”: nursery schools, incentives for working mothers, a state market of part-time work, income support which takes into consideration the scarcity of work on offer for women with children and the expenses for the children themselves, etc.77

69 Trifiletti 2003, 126 (my translation).
68 In Italy social rights are not universal; they depend on the kind of employment and the form of contract.
70 ISTAT 1999.
72 Santi 2003, 164f.
73 Sundström 2003, 34.
74 Sundström 2003, 40.
75 Sundström 2003, 34.
76 Sainsbury 1999, 219–221. See also Trifiletti 1997, 212.
The Public services on offer still presuppose that a family can count on a full-time housewife mother or on a full-time grandmother substitute, but nowadays there are grandmothers who are still working and this is a problem for Italian women. The traditional family model is hence socially and politically taken for granted. “The definition of what constitutes a family or a household is at stake, although the subject is not central in the public political debate and the political connection between service needs and working hours is weakly articulated.”

Resource inequality between the different types of families is growing deeper: care services for children and the elderly are often unaffordable. In Italy the number of single parent families led by women is increasing, and for them the risk of poverty is remarkably high, as only the richer families can afford to rely on the market for their need for services. Despite wide local variations, nursery schools remain a service with weak cultural legitimation. Nowadays they are solely funded by local councils, and are hence more exposed to cuts or rises in service prices. In Italy, to pay for nursery school 20 percent of the average income of a double career family is usually necessary.

Table 5. The net cost (after taxes and transfers) of nursery school for an Italian family with average income and two children (first half the 90’s).

<table>
<thead>
<tr>
<th></th>
<th>Net cost in % of average family income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>39.3</td>
</tr>
<tr>
<td>Sweden</td>
<td>15.7</td>
</tr>
</tbody>
</table>

The Italian welfare state discourages female work, not only because it does not provide public services for infants and the elderly, but also because tax systems penalise double income couples.

The Italian social state assumes that breadwinners earn a family income, and hence considers transfers to the family unit as superfluous; moreover, it assumes that all families conform to the male-breadwinner model and plan only residual transfers to the benefit of “atypical” family units, as in the case of single mothers. In addition, family allowances supplied by the social state are largely insufficient.

Table 6. Family allowances.

<table>
<thead>
<tr>
<th></th>
<th>Family allowances in % of the average income of a working couple (1990)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>0.7</td>
</tr>
<tr>
<td>Sweden</td>
<td>4.3</td>
</tr>
</tbody>
</table>

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78 Sundström 2003, 14.
79 Saraceno 1995, 50.
82 Bernardi 1999, 33, 82ff; Boeri and Perotti 2002, 128f.
83 Esping-Andersen 2000, 125.

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According to Sainsbury the male-breadwinner policy regime, which gives high wages and generous social and tax benefits to the family provider, enables married women to provide care not only in their home but also outside, by engaging in volunteer carework. Since caring activities are not remunerated work, women are excluded from social-insurance schemes that form the backbone of social provision in conservative welfare states.

Judging from this bleak situation, one could expect gender issues linked to the welfare system to rank high on the agenda in public debate. Surprisingly it is not so: not even the presence of women in politics is currently under discussion, and that is the area where they are being excluded the most. Recently, only the law on assisted procreation seems to have roused a number of the Italian feminists, who organised protest activities regarding this issue in various Italian towns.

What is the role of the Church today? Is the Church more aware of the link between gender and social disparities? Historically the Catholic Church has played a conservative role, defending the traditional family model, based on the division of duties between the members of the couple: the man earns bread on the market and the woman does full-time housework. Nevertheless, the Church has always been aware of social disparities and has been acting “on the frontline” through its associations. It is hardly possible to relegate gender issues to the shadows much longer, for they are, as we have tried to delineate, closely bound to the contradictions of the Italian welfare State. That which is a solution to the welfare crisis in richer countries is a problem for the poorer ones. This can be seen in the “global care chain.” This is particularly true for those immigrant domestic workers whose wages are so low that they are not able to bring their families with them or to visit their children regularly. Catholic associations were some of the first voices to bring to light this problem of the “shattered families” of migrants. “Is it just that care be solely a female responsibility? Is it right that emancipated women from richer countries unload domestic responsibilities onto less emancipated women from poorer countries for the reason that they are not able to work out a solution with their partner? Is it correct that society (every society) does not consider domestic work in its two aspects, work to be recognised economically and free labour which falls to everyone, from which no one should be exonerated?”

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84 Sainsbury 1999, 254f. See also Frisanco and Ranci 1999.
85 Del Re 2003, 236.
86 Esping-Andersen 2000, 140; Bernardi 1999, 33. The legitimisation of traditional roles also came about through models of sanctity that imprisoned women in obedience and resignation, like Rita da Cascia, awarded sainthood at the beginning of the 19th century, or Maria Goretti, canonised in 1950. Bravo et al. 2001, 36f and 68f.
89 Castegnaro 2002.
91 “è giusto che la cura sia un obbligo solo femminile? è giusto che le donne emancipate dei paesi ricchi scarichino la cura sulle donne meno emancipate dei paesi più poveri anche perché non sono in grado di contrattarla con i loro partner? è giusto che la società (ogni società) non consideri la cura nei suoi due aspetti, di lavoro da riconoscere anche economicamente e di relazione gratuita che compete a tutti, da cui nessuno deve essere esonerato?” Bimbi 2003, 15.
In the Italian case study of the project Welfare and religion in Europe we will delve deeper into this subject through thorough interviews with Church representatives and theologians, aiming at understanding the links between welfare, Church and gender and defining the possible scenarios.

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The Greek welfare system

Recent demographic developments in Greece

The Greek population is estimated at approximately 10.9 million: 5.4 million men and 5.5 million women.¹ Recent demographic developments in Greece during the last 30–40 years should be viewed within the context of important social changes in the stability of the traditional family unit. Upward trends in divorce and out of wedlock birth rates, declining numbers of marriages and the emergence of new forms of families (single parent families, or cohabitation, etc.) are challenging and possibly diminishing the traditional Greek family, reflecting a new Greek social dynamic with direct consequences for demographics.² The following demographic trends seem to be consistent with other member-states of the European Union but have to be nuanced by taking into account the continued importance of the family unit in Greece and in other Southern European countries (Italy, Spain, etc.), as illustrated for example by lower divorce rates compared to countries of Northern Europe.

Greek birth rates remained high during the post-war period (although we cannot speak of a “baby-boom” generation in Greece) until about the early 1980s. Various social trends, including more women entering the workplace and higher costs involved in raising children (education, healthcare, etc.), have contributed to declining fertility rates since the 1980s: birth rates increased by 0.44 percent from 1961 to 1971, by 1.06 percent between 1971 to 1981, and by 0.67 percent from 1991–2001.³ The current fertility rate of 1.29 (1998) is well below the necessary natural growth rate of 2.1 for securing the renewal of generations. Therefore, these current levels contribute in significantly reducing the size of the future Greek population, through a shrinking natural growth rate and, thus, an insufficient renewal of generations in the population.⁴

As a result of declining fertility rates, we can observe in Greece the increasing prevalence of the small size nuclear family; this is also illustrated by the declining average size of households: households with 6 or more family members fell from 24 percent in 1951 to 5 percent in 1991, and small size households rose from 10.1 percent in 1961 to 18 percent in 1991.⁵ Meanwhile, the traditional tendency of

¹ Ministry of Health and Welfare 2003, 10.
³ Maratou-Aliprantzi et al. 2002.
young couples to live with their parents, and of the elderly to live with their children, is no longer as prevalent. Parallel to this trend is the tendency for women to get married and have children, at an older age (primarily between 25 and 34 years old), as illustrated by the declining percentage of young women (15 to 24 years old) having children. This is due, for example, to the advancement of the status and life situation of women in Greek society, their desire for independence, and the increasing numbers of women who enter the labour market and wish to establish a career, affecting attitudes to reproduction rates and child bearing. However, compared to other European countries, these trends have to be viewed within the specific family and child oriented character of Greek society, with young people usually living with their family, thus, being financially dependent on them, until they get married (primarily in the case of young single women) or until they reach an established career or steady profession (primarily in the case of young single men).

Declining fertility rates have also significantly altered the age and geographical distribution of the population. This can be illustrated by the aging of the Greek population with a sharp increase of those over 65 years old (from 8.19 percent of the total population in 1961 to 16.73 percent in 1998), similarly to other European countries. During the last 50 years, the percentage of people aged over 65 has increased from 1 percent to 17 percent, and this trend is expected to continue further. The continued aging of the Greek population can be attributed not only to declining birth rates, but also to declining overall death rates due to longer life expectancy among both adults and infants and to the emigration of young Greeks, primarily during the 1960s and early 1970s.

In terms of the geographic distribution of the population, there is an increased concentration of the Greek population in urban areas in and around Athens, Thessaloniki, and other smaller cities (43.3 percent of the population lived in urban areas in 1961 and 58.9 percent in 1991), with decreasing population levels in agricultural/rural areas which reached their peak in the 1970s (43.9 percent of the population lived in agricultural areas in 1969 and 28.3 percent in 1991). This trend is closely linked to the fact that Greece has always had a heavily centralised administrative system with political and economic decision-making centralised in Athens. This movement towards the capital and other urban centres is also partially due to declining income levels in agricultural areas. Although this trend has now slowed down a bit, there is an imbalance in the geographical distribution of Greek population, as 68 percent of the population lives in urban or semi-urban areas. Almost one third (30 percent) of the total population lives in Athens and its peripheries, thus making the capital the primary centre of Greece’s economic, social

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7 Maratou-Alipranti et al. 2002.
8 Maratou-Alipranti et al. 2002.
10 Robolis et al., 2003, 173.
13 Sotiropoulos 2003, 105.
and cultural life; the corollary results of this are environmental pollution, and circulation and housing problems. One element that has remained constant is gender distribution, with an average of 100 men for 103 women.

In terms of education and literacy rates, as another reflection of demographic trends, education in Greece is free and compulsory between the ages of 6 and 15, while university education is also free but subject to entrance exams. There is a 95 percent literacy rate for the whole of the Greek population, 98 percent for men and 93 percent for women. Education levels have increased significantly, with declining illiteracy rates (from 13.9 percent in 1971 to 6.8 percent in 1981) and increasing percentages of the population participating in schooling in secondary and higher education for both men and women. Nevertheless, women continue to lag behind in terms of education, with a 4–5 percent gap after men in all categories and sectors. The average duration of school life has been constantly stretching, particularly for women, currently up to 13 years. Population participation in education is almost universal in primary education (97 percent), intermediate in secondary education (40 percent–70 percent), and lower in higher education (taking into account that the population participation percentage in higher education has doubled in the last 30 years, from 7.5 percent to 15 percent in the last 20 years).

Finally, immigration forms an especially significant part of Greece’s recent demographic profile. Greece has traditionally and historically been a country of emigration, exporting more people than it received, with Greeks leaving their country, particularly in the early 1900s (mainly towards the USA) and in the post war period (1950s–1970s) primarily towards Europe, expecting to find a better life abroad. They have formed an extensive Greek diaspora all over the world. Since the 1980s Greece, as a country of emigration, has been transformed into a place of immigration, becoming a host country to thousands of immigrants primarily from the Balkans (Albania), Eastern Europe and the former Soviet Union, and the Middle East, with smaller numbers also coming from Asia and Africa. Between 1991 and 2001, 97 percent of the population increase was due to immigration, and only 3 percent due to natural population increase. Immigrants to Greece, most viewed as foreigners, can be Greek repatriates (particularly from the former Soviet Union); EU nationals and other non-EU work permit holders (legal immigrants); refugees and asylum seekers; and illegal residents and workers. They form a critical part of Greece’s labour force, finding employment in the agriculture and fishing, building and construction, manufacturing and service sectors. Additionally, immigrant labour (especially from the Philippines) seems to have filled increasing demands for domestic help and nursing, due to the lack of adequate welfare services and social development.

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17 Maratou-Alipranti et al. 2002.
21 Kyprianou et al., 2005, Mesthenes 2002.
care facilities for children, the elderly or the handicapped. Immigrant workers are concentrated in Athens and its surrounding areas in Attica, but also in other urban, semi-urban and agricultural areas. Although immigration is seen as one form of compensation for the declining numbers in the Greek working population, given the expected declining birth rates in the future, it seems that only an increased number of immigrants into Greece could cover this growing gap in the workforce. Moreover, if immigration is viewed as one solution to Greece’s workforce problem, it does, however, add further pressures to the social services sector, such as healthcare, social services, pensions, etc., and cannot reverse the overall demographic trends expected in the next few decades.

Greece’s overall demographic profile, marked by imbalances in the age distribution of the population – low fertility rates, higher life expectancy rates, the aging of the population and declining numbers in the workforce – and in the geographical distribution of the population (population disproportions between urban and agricultural areas), increasing immigration and education levels (especially among women), and new social trends with changes in the dynamics of the traditional Greek family unit (increasing divorce rates, decreasing numbers of marriages, “out of wedlock” birth rates and the emergence of new forms of families) have direct consequences on economic development and on various aspects of social policy; they challenge the welfare system, in terms of public spending and public debt levels, the labour market, education, healthcare, and social security. The aging of Greece’s population is increasing the number of pensioners and public spending on pensions and healthcare, thus adding further pressure to an already over-extended pension and healthcare system, while decreasing numbers in the employed population (workforce) contribute in slowing down economic development. Increasing demands for institutional social care for the elderly, over-burdening of the healthcare system due to longer life expectancy rates and immigration, higher social security costs due to a larger number of pensioners, and increasing demands for social care and support services for individuals or families due to divorce, unemployment, drug abuse, etc., are only some of the challenges to the Greek welfare system in the near future.

Historical background
The specific configuration of the Greek social welfare system can be understood by looking at Greece’s overall political, economic, social and religious history and how it has collectively shaped its welfare system and social policy. An examination

22 Mestheneos 2002, 189. Philippino women were amongst the first female migrants to Greece, most were ‘invited’ (i.e. worked as documented workers), were semi-skilled, and communicated in English; accordingly, they tended to have well-paid jobs (see Maratou-Alipranti and Fakiolas 2003). It is mainly poverty that drives Philippino women to seek work in Greece (the average per capita income in the Philippines is one-fifth that of Greece), and their contracts for domestic work in Greece are usually arranged beforehand, through recruitment agencies in the Philippines (see Karakatsanis and Swarts 2003, 247–248).

23 Robolis et al., 2003, 176–177.


of the historical evolution of the Greek welfare system is useful in illustrating how the current challenges of the Greek welfare state and social policy are a result of problems and issues which are historically rooted, some of which date back to the creation of the independent Greek state in the early 1800s and Greece’s subsequent turbulent political history in the 19th century. First of all, it is important to note that in the last 30 years of Greece’s post-war history, the country evolved gradually from its traditional image and developed into a European state. Greek society was rapidly transformed from an agrarian to a semi-industrial and services-oriented economy with a deep disconnection between industrialisation levels and social development and social protection; economic wealth and technological prosperity were accompanied by relative social deprivation and large gaps in terms of income, healthcare, education, social protection and employment among specific socio-economic strata. Because of Greece’s strong centralised administrative system, decentralisation policies have focused on strengthening regional decision-making capabilities according to 13 administrative regions (peripheries), headed by a regional governor, which are then further sub-divided into 51 prefectures (nomarchies), each headed by a prefect (nomarchis), who is elected by direct popular vote every 4 years. However, these administrative regions do not have independent tax status and are directly dependent on central government to cover their functioning costs and for the implementation of most of their programmes.

The evolution of the Greek social welfare system can be traced historically in three periods: a) from 1833 to 1921, covering almost the first century in the life of the newly created Greek state, b) from 1922 to 1974, covering Greece’s turbulent political history in the first part of 20th century, and c) from 1974 until the present, covering the restoration of democracy and Greece’s membership in the European Union.

a) The origins of the modern Greek social welfare system date back to the creation of the modern Greek state. It is thus after the war of independence in 1833, when the modern Greek state had to deal with a variety of social problems (including the care of orphans and the handicapped from the war of independence and the First World War and the health of its citizens), that we can talk about any organised form of social welfare provision in modern Greece. During that period, the Greek state developed a legal and institutional framework for the creation and operation of state schools, hospitals, prisons and orphanages, including the creation of the Ministry of Care in 1918. It is important to stress the challenging task for the newly created Greek state, which had to face and deal with a significant number of social needs and problems with very limited financial resources. Pensions and the social protection of citizens were first developed in 1836, with the creation of pension funds according to professional sector. It is also important to stress the contribution of private sources of welfare provision in areas of social need, for example orphanages and schools which were set up with the financial assistance of

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well-established Greeks in the diaspora, private individuals in Greece, and philanthropic organisations. The newly established Autocephalous Church of Greece also had an important role in responding to the social needs of the Greek population, such as donating land owned by the Church and Orthodox monasteries for building hospitals, schools and orphanages and providing material assistance to those most in need at a local parish level.

b) The second period, from 1922 until the restoration of democracy in 1974, is marked by a turbulent political history in which the Greek state had to deal with a variety of critical social problems and issues arising from major historic events, such as the Asia Minor conflict and the arrival in Greece of over a million Greek refugees from Turkey; the second world war; and the Greek civil war. The problems which arose with the mass influx of refugees and with the war forced the Greek state to take an even more active role and contributed to the development of state intervention in social welfare, since the Church and private voluntary organisations and sources were unable to deal with the increasing social problems of that period. Therefore, the functions of the Ministry of Care were extended to address the larger problems faced by the Greek state, including the care for and integration of refugees into Greek society, the further development of public health infrastructures, the introduction of labour laws and a social protection framework with the creation of the Social Insurance Organisation (ΙΚΑ: Ιδρυμα Κοινονικον Ασφαλισθεων) in 1934. This was a critical step in the development of the Greek social security system.30 Again, private voluntary organisations in Greece and abroad had a key role in offering material help to groups in need, especially Greek refugees and war victims and orphans. In that context, the Greek Church continued its voluntary social service and in 1941 created a national organisation of Christian aid (EOXA), providing food, clothing, shelter and children’s homes. The Marshall Plan, which from 1948 to 1952 granted critical financial assistance to the Greek state, contributed to the re-organisation of the Ministry of Health and Social Care. At the same time, a variety of voluntary Greek and international organisations and churches offered not only material aid to the Greek population, but also “know-how” by creating social work schools and training programmes, which provided social service to the Greek population in need in parallel to the Ministry and the Greek State. During the military junta, no new significant measures or developments took place in the area of social welfare.

c) The concept of social welfare as a function of the Greek state began to develop in the mid 1800s, but it is only after the restoration of democracy in 1974, following the collapse of the junta, that we can observe the development of a proper welfare system in Greece.31 Even though the text of the constitution of 1974 (which, it should be noted, is still in effect today) does not include any specific reference to a social state, many of its articles have a clear social content, including among others the state’s obligation to provide free education and social protection to all citizens, and to protect and look after the family, the institution of marriage, motherhood,
children, the elderly, citizens with special needs (the handicapped and poor) and the health of its citizens. Therefore, the existence of a social state as an essential constitutional element is recognised indirectly, rather than directly, by the Greek state. Until 1981, the Greek state gave greater priority to the rehabilitation of the Greek economy and to Greece’s entry to the European Community, despite the ongoing social problems, which were not seriously addressed or resolved by the various governments.

It is not until after the first Greek socialist party came into power in 1981 that there were significant changes in the development of Greece’s social policy and welfare system. The most significant development of the period after 1981 has been the creation of a unified National Health System (ESY), aimed at providing free and comprehensive health care coverage and attempting to reduce the fragmentation of the old health care system by addressing the problem of healthcare distribution in small towns and rural areas and raising the level and quality of service. It continues to provide healthcare services through dedicated staff and doctors (who work only in the public sector), while restricting the private health sector. During that period, the socialist government also gave priority to the strengthening of the welfare system by providing cash benefits, such as salary and pension increases, and to the reorganisation and state subsidisation of the under-funded Social Insurance Organisation (IKA), the national fund covering pensions and other social policy needs; it also established a minimum automatic price index increase in the calculation of pensions.

Since the 1990s, Greek state intervention has been marked by (successful and unsuccessful) attempts directed towards the decentralisation of the welfare system, state retrenchment through the privatisation of parts of the public sector, and the adaptation of practices to EU regulations. In the early 1990s, during a brief period with a conservative government in power, there was a shift towards a more neoliberal approach to social policy with the goal of a general financial restructuring of the social security system, including making pension contributions more uniform and raising pension age from 58 and 60 to 65. The attempted reforms of the 1990s involved all sectors with efforts to adjust pension levels, such as stricter contributions and the abolition of the most generous provisions, and to consolidate and unify health funds. At the same time, the OGA (Organismos Georregikon Asfaliseon), providing health care benefits and pensions for farmers, which was previously neglected, was strengthened and consolidated and it is now the second largest (after IKA) health and social security scheme covering the whole of the Greek agricultural population. However, as many vested interests were affected, massive social unrest (strikes) forced the government to stop most of these reforms, so its minor interventions came too late and since they were fragmented. did not go far enough. It was in the

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32 Papadimitriou 1993, 133.
33 Papadimitriou 1993, 134.
36 Sotiropoulos 2003.
38 Venieris 1997.
late 1990s, with a socialist government again, and under pressure from the EU, that there was another attempt to push through some privatisation in parts of the public sector, austerity measures and labour market flexibility to prepare Greece for the Maastricht requirements of economic and monetary union, that some institutional reforms were attempted. In 1998, a law (law 2646/1998) for the development of the national system for social care was aimed at the restructuring of the fragmented welfare services provided by a variety of welfare organisations; since then, further initiatives attempt to integrate and coordinate health and social care services at a regional level in a multi-sector approach (involving the co-ordination of 5 different Ministries), with the establishment, for example, of special regional and social committees for the development of programmes. In 2001, the organisational structure of the health care system was changed with the introduction of 17 regional health care authorities (responsible for the implementation of health care and social and welfare services), thus developing decentralised regional structures. At the same time, the government launch of a long lasting "social dialogue", allowing all social partners and government officials to negotiate social reform, was not able to overcome disagreements and polarisation among the different partners. At the end, a so-called "mini intervention" was achieved, focusing on pensions and health, increasing funding to IKA and attempting to shape it as a single fund of wage earners. More generally, it seems that the more recent interventions of 2002 attempting to restructure the social insurance system, primarily pensions, reflect more of an effort to adjust to crisis rather than to adopt a true reform, and thus alleviate chronic inequalities and inefficiencies.

The constant structural elements that have characterised Greece’s post-war social policy and continue to do so today, include primarily the problematic ways by which social welfare is funded, the legal context, the inequality of services supplied and the internal organisation and operation of the social security system. Therefore, the development of the Greek social welfare system is the result of specific economic, social and political factors. One remaining critical question concerns the need for further decentralisation and the problem of the disparate development and unequal distribution of social benefits among different strata of the population, according to professional (public and private sector employees) and political criteria (clientelism based on political credentials).

Therefore, the basic characteristics of social protection in Greece are related to the delayed development of the welfare state, the increased fragmentation of the system, large gaps in the provision of social services and benefits with disparities between those who demonstrate a continued professional career and those who are not able to do so (women, unemployed, young people and those who are employed unofficially in informal labour) and inequalities between those who are insured in

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39 Petmesidou 2000, 312.
40 Ministry of Health and Welfare 2003, 75.
41 For a complete and detailed description of the Greek health care system, see Ministry of Health and Welfare 2003.
42 Petmesidou 2000, 312, Venieris 2003, 137.
44 Sotiropoulos 2003, 91.
different insurance funds (according to their type of profession). These gaps have, traditionally, been filled by the family, which, as we will see, is not adequately supported by state social policies.\textsuperscript{45}

**Brief description of Greek welfare**

The key characteristics of the Greek social welfare model, which overall seems to fit in the Southern European welfare model, stem from the strong Greek traditional family structure (“familialism”), from recent demographic trends, from Greece’s delayed transition to democracy following an authoritarian political regime (1974), and, thus, from a delayed development of its social welfare system (essentially after 1981).\textsuperscript{46} Additionally, related factors, such as political clientelism and favouritism (both in the higher civil service and in the relations between society and political parties), uneven distribution of human resources in the public sector, an inflated legalistic and formal bureaucracy and a lack of a competent administrative elite, contribute to the current status of Greek social welfare.\textsuperscript{47}

But certain specifically Greek characteristics must also be taken into account, namely the importance of small to medium size companies, self employment and the limited extent of salaried work, accompanied by a large informal “black” economy (ongoing benefit fraud and tax evasion) and informal labour.\textsuperscript{48} In 1995, Greece had the highest proportion of self-employed people (in both urban and rural areas) and the lowest number of salaried workers in the EU\textsuperscript{49} and it is estimated that this trend has not changed drastically since. The result is a centralised social state that is the product of no long term planning and of various group pressures and which is a “mosaic” of regulations and benefits, up to the point of being often characterised as a “state of clientilist provision.”\textsuperscript{50} In this context, the welfare philosophy that developed focused on individual and particular needs rather than collectively on those of the society; this is also reflected in the way social protection is funded (primarily through individual contributions to specific funds).

The Greek welfare model is based on a combination of the corporatist and liberal models, namely a mix of public (state) and private actors (individuals and voluntary institutions/charities, the Church, and the family).\textsuperscript{51} Social protection in Greece is limited primarily to the granting of financial benefits (allowances), rather than the provision of proper social services.\textsuperscript{52} Despite recent increases in social spending, which are now approaching the EU average, Greece is considered a weak social state, with an imbalanced pattern in the welfare it offers.\textsuperscript{53}

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\textsuperscript{45} Petmesidou 2003, 489-490.
\textsuperscript{46} The Southern European model as defined by Martin Rhodes et al., 1997, and Matsaganis 1999, among other scholars.
\textsuperscript{47} Sotiropoulos 2003.
\textsuperscript{49} Symeonidou 1997, 70.
\textsuperscript{50} Symeonidou 1997, 70.
\textsuperscript{51} Matsaganis 2003, 135.
\textsuperscript{52} Matsaganis et al. 2003, 643.
Expenditure has increased since the late 1990s from its past low levels, compared to other EU countries. In 2001, social expenditure was estimated at 35.6 million euros, 27.2 percent of GDP (EU average: 27.5 percent). Benefits linked to old age and surviving families (51.3 percent – EU average: 46 percent) made up the largest part of Greek social protection expenditure, followed by unemployment (30.7 percent – EU average: 36.2 percent), family and children (6.9 percent – EU average: 8 percent), healthcare and disability (6 percent – EU average: 6.2 percent) and housing and social exclusion (5.1 percent – EU average: 3.6 percent). The main sources of financing for social protection were social contributions made first, by employers (38.5 percent – EU average 38.8 percent), and then by protected persons (employees, self-employed persons and pensioners) (23.5 percent – EU average 21.7 percent) and the government (27.8 percent – EU average 36 percent), but also by other forms of contribution (for example, property income), which are relatively high in Greece compared to the EU average (10.2 percent – EU average 3.4 percent).

The role of the family

The family (primarily women) has traditionally acted in Greece as a substitute and compensatory mechanism in preventing material deprivation and poverty in caring for children and the elderly, thus, filling in the inadequacies of Greek social welfare. In general terms, Greek social protection is marked by an over-development of benefits to the elderly (through generous pensions) and an under-development of family protection services. In this way, Greece is a typical case in point of the “Southern European welfare state model” and the “male bread winner” system, within which, in addition to and because of the social care they provide within the family, women are not facilitated by social policies to enter the labour market. Given the importance of the supportive role of close and extended family in Greece, the role of women as providers of social care towards family members (elderly, children, etc.) in unofficial and unpaid forms cannot be over-stated in Greece. In that sense, married couples are even more interdependent, with the man as the breadwinner and the woman as the caretaker. The importance of the family, namely the role of women, is illustrated in childcare (with grandmothers often helping to raise and look after young children) and elderly care (women looking after and providing financial support to the elderly members of the family, since their placement in nursing homes is highly stigmatising for a Greek family). Another aspect in which the family holds a special role and illustrates the child-oriented character of Greek society, involves education, which is paid for by the

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54 European Social Statistics 2004, 14 and 31.
55 Income maintenance and support in connection to the death of a family member (European Social Statistics 2004, 54).
56 European Social Statistics 2004, 55.
57 European Social Statistics 2004, 85.
60 Symeonidou 1997.
62 Symeonidou 1997, 80-81.
parents, sometimes after major sacrifice to send their children abroad for a better university education. Related to this is the financial dependence developed between children and the family, with approximately 50 percent of young people usually living with their family until marriage or the establishment of a career.63

Therefore, the Greek family, as in other Southern European countries, is a provider of social services and acts in most cases as an informal preventive mechanism for widespread social exclusion and social problems.64 It also acts as a means for young and unemployed people to maximise their financial resources (savings) while living within the family in order to be able to start or continue their adult life outside the family in more favourable conditions.65 However, this social solidarity is not always efficient, as those who are outside a family network can “fall through the cracks” into social precariousness and in a social environment, where social safety nets are minimal. Furthermore, the increased role of the family is not without difficulties, for example an over-dependency between children and the family, can have long term implications in terms of the professional, social and psychological development of young people; it also relates to problems such as the over burdening of the family and women (especially those who may wish or have to work outside the home) with a variety of overwhelming family tasks. Therefore, the Greek family unit is increasingly under pressure, as women who enter the labour market are overloaded with the task of fulfilling their professional and family responsibilities all at once. (See below for a specific focus on the role of women as caregivers).

Beyond state benefits and the informal but important care provided by the family, social needs that are not fully satisfied by the family or the state are usually filled by private or voluntary sectors (international organisations with Greek branches, such as the Red Cross, SOS Children’s Villages, etc.)66 and the Church. Therefore, the Greek case is a good example of the Southern European welfare model, with a classic underdeveloped state welfare sector coupled with the important role played by the family and women in providing essential social care. In this bi-polar model, the Orthodox Church is a third source, offering a wide array of social services, including the provision of support services for women and the family (see part II). The Greek example is schematically described as a triangular welfare model (state-family/women-church), in which the family and women seem to act both as providers and receivers of social care.

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64 Rhodes 1997, 10.
65 Flaquer 2002, 57; Chletsos 1999, 277.
66 According to the EIWSR study in 2001 on the contribution of confessional and non-confessional humanitarian organisations to the provision of social services in Europe, there are 10 types of non-governmental groups providing voluntary services to individuals in Greece: voluntary organisations (groups providing services to third parties), self-help groups, international organisations, various interest non-governmental organisations NGOs), religious associations and initiatives, associations and initiatives working with the government, associations and initiatives working with the local state authorities, emergency action, non-profit foundations, actions through EU networks and programmes (EIWSR, 92). For a more detailed analysis see EIWSR 2001.
Social benefits offered by the state

Health and social care services in Greece include (but are not restricted to):

- **Health and pharmaceutical care** (including maternity and disability insurance).
- **Pensions** and supplemental top-up pensions (when the level of coverage by the primary pension is considered insufficient; it is funded by employees and covers an additional 20 percent).
- **Social care** (unemployment benefits, housing, childcare, etc.) to children and families, the elderly, people with disabilities and other vulnerable groups in the population (special needs, Greek Roma communities, asylum seekers and refugees).
- **Health care** is provided by the National Health System/ESY (operating hospitals and primary care centres), health units (operated by insurance funds, particularly IKA), and the private sector (specialty doctors and clinics, diagnostic centres and laboratories, etc.). The, so far, inadequate national health-care system (ESY) has not been able to provide truly universal healthcare, thus, leading to the development of a private/public sector mix (including the existence of a black economy in the medical field) and the flourishing of the private healthcare sector of private hospitals, clinics and doctors, which play a leading role and, thus, often collide with the public healthcare sector. Health insurance is compulsory and operated by approximately 30 health insurance funds (including IKA and OGA) depending on the occupation and income levels of the insured person.
- **Pensions** are the backbone of social protection, making the Greek welfare system a "pension-heavy" structure, characterised by large social security and pension programmes: the vast majority (almost 90 percent) of allowances (cash benefits) granted by the Greek state are traditional pension payments, rather than allowances for long-term unemployment and poverty, and proper social services. As a result, because of an early retirement age and the aging of the population, Greece has a higher percentage of pensioners compared to other EU countries. Pensions are financed by employee, employer and government contributions to specific funds, with some funds being financed by the state; they provide benefits to retired persons, their spouse and families. Looking more in depth at the Greek pension schemes, there is a further obvious fragmentation of its structure along occupational lines with approximately 172 different social insurance agencies administering pensions and supplementary top-up pension schemes and funds; however, the majority of the pensions are being paid by 3 primary funds, responsible for protecting approximately 90 percent of the population (IKA, covering 50 percent of the population, followed by OGA, covering

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67 Symeonidou 1997, 71.
70 Symeonidou 1997, 74.
71 Symeonidou 1997, 74.
about 25 percent of the population and TEVE, approximately 13 percent).  

There is an unequal and disparate distribution of entitlements and benefits: bank, government/state employees, doctors, lawyers and engineers gain far more generous pensions in comparison to lower paid employees in the private sector and to those who have not had a continuous employment (women and others who have been temporarily unemployed and young people).  

Retirement age (between 60 and 65) varies, being lower in the public sector and higher in the private sector and among the “liberal professions.” Because of the above fragmentation of pension schemes and the absence of a universal basic and minimum pension, there is an unusually high percentage of poverty among those over 65 years (35 percent poverty rate for those who are over 65).  

Therefore, poverty (particularly, widespread old-age poverty) remains a critical issue in Greek social policy, as it is higher than in most EU countries and, similarly to other Mediterranean EU countries, it is associated with old age, residence in rural areas, low educational qualifications and unemployment. In this context, it is important to note that Greece is one of the few countries of the EU that has not yet established a minimum income guarantee that can act as a safety net. Given the ongoing problems of the Greek economy, the worsening ratio of pensioners to contributors (due to the ageing of the population), the tendency of insurance funds to borrow from banks at high interest rates and the state spending of social security fund reserves for other social policy purposes, the current crisis in the pension system has been on the political agenda for social reform since the early 1990s. Recent state interventions have raised the contribution rates for employers and employees and the age of eligibility, while decreasing benefits to pensioners.  

- Social care is rather under-developed in Greece, compared to western European countries, as there are large gaps in the coverage offered by the social insurance system. Thus, if social expenditure in Greece has dramatically increased since the late 1990s from its past low levels, compared to other EU countries, there is a notable lack of expenditure, development and effectiveness in addressing maternity/family, housing, senior citizens, poverty and unemployment, especially for those who are “atypically employed” (for example, women, young people, etc), all these remain problematic areas (for women and young people), relative to the existing generous pension programmes.

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74 Tsakloglou 2000, 351, Matsaganis 2002, 112.
75 Tsakloglou 2000 351.
76 Matsaganis 2003, 135–6, Tsakloglou 2000, 351.
77 Symeonidou 1997, 71.
78 Symeonidou 1997, 74.
80 Matsaganis 2003, 141.
Social services and benefits are provided by the state and local state authorities, to which central state authorities delegate social policies. State local authorities are important sources of social care in Greece since they plan, coordinate and implement programmes locally offering social protection for the family, for mothers and children, for special needs groups and for the elderly. However, local state authorities still remain somewhat dependent on central government for the implementation of most of their programmes.

In terms of social protection for the family, the Greek state and local state authorities provide some allowances (subsidies, extra pensions and benefits, and tax exemptions to large families and single-parent families, etc.) and a variety of services, including nurseries and childcare centres (under the jurisdiction of municipalities) and summer youth camps; most of these services are typically directed to families in crisis, large families in need and abandoned children. There are also a variety of programmes for the elderly, which are implemented by municipalities. They include state financed “Daily Care Centres” and “Open Care Centres” for the elderly (KAPI), providing psychological and other support services to elderly people, as well as, “Home Help” services (nurses, social workers, etc.) to frail elderly people who live in their own personal or family environment.

Finally, there are a variety of state financed programmes for persons with disabilities (such as disability benefits and boarding houses for semi-independent living and full-time living for disabled persons, as well as, activity centres and summer camps for persons with disabilities) and other vulnerable groups (refugees and asylum seekers and Greek Roma communities) in collaboration with NGOs.

Challenges for the future

The key characteristics of the Greek social welfare system, namely the inadequacy and lack of uniformity of benefits, the lack of long term planning and coordination, an inflated bureaucracy, accompanied by cliental relations and favouritism and, thus, the inequality in the coverage of the population, in addition to pressures caused by demographic trends (ageing of the population, immigration, declining fertility rates and changes to the traditional family unit), point to the most important challenges for the future. These challenges should be viewed on two levels: first, material and implementation-oriented issues for the short term, involving specific

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82 Carlos/Maratou-Alipranti 2002, 155.
financial and re-structuring actions, and second, more policy-oriented challenges for the long-term, involving the actual conceptualisation of social protection.

At a first level, some of the main challenges ahead involve addressing problems of long term unemployment and social exclusion (particularly among young people and women), poverty (particularly among the elderly), reforming and restructuring pension schemes and the healthcare sector, and regulating illegal immigration and informal labour. At a second level, one of the greatest challenges ahead is ensuring better coverage and uniformity of benefits with the establishment of safety nets (such as minimum income levels), equality in the allocation of benefits and the eradication of cliental relations and bureaucracy. Furthermore, in order to be able to meet the three goals of welfare: insurance against risk, welfare safety net and income redistribution, changes need to be made in the way social welfare is conceived, as providing an active social protection with social services and preventive measures, rather than just offering passive benefits and “curative” actions. There is a need to shift a welfare philosophy from one that is focused on administering income-maintenance to one that favours the provision of social services, rather than benefits, in response to specific needs, such as long-term unemployment. Finally, any comprehensive reflection on how social welfare is conceived must also examine who provides social services, considering sources other than the state and local state authorities. Therefore, another challenge and issue for further discussion and debate is the development of more flexible schemes for social service provision, including collaboration schemes of local state authorities with private and civil society initiatives. This idea involves the possibility of transferring some social service provision from the state to civil society and the community, including a large network of voluntary organisations (for example, NGOs, religious/ecclesiastical organisations, self-help groups, international and local community organisations).

As a direct result of these challenges, pension reforms have been on the public agenda since the early 1990s; but since 2001, social policy issues overall have increasingly become the topic of public debate in Greece. This was particularly the case in the early part of 2004, during Greece’s pre-election period, when politicians publicly addressed and included social policy concerns in their electoral campaigns. Debates on social security issues and the changing labour market, ongoing restructuring plans of the healthcare and social welfare sectors and an action plan against social exclusion indicate a renewed interest in social policy issues and an attempt to restructure the social state as a whole, as a prerequisite to a more open and fair post-industrial society.

Some more specific issues on the current agenda include: long term unemployment (for over one year), regional unemployment (especially in northern Greece),

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86 Petmesidou 2000, 312, Matsaganis 2003, 143.
87 Sigg et al. 1996.
89 Petmesidou 2000, 312.
90 Matsaganis 2003, 133–135.

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pension levels (i.e., the provision of pension levels that are equivalent to the level of the last salary earned), pension age, cost coverage for additional social provisions to women and children (whether it should be by the government through taxation, or through contributions of employees to their income tax payments) and social security contribution evasion (by employees and employers who fail to meet their contribution payments to social security funds). Additionally, it seems that gender issues have entered dynamically the social agenda of public debate and relate specifically to women, for example the increased participation of women in the labour force, the decrease in the number of unemployed women (women who had jobs and lost them) and the construction of an improved support infrastructure for childcare.

The majority Church and its role in the welfare system

The Greek case study illustrates how the Orthodox Church, a different ecclesiastical and theological tradition (relative to the religious traditions of other European countries included in the study), is a social actor that participates in social welfare within a specific national socio-religious context. The current religious situation in Greece is characterised by a fusion of official (i.e. close Church and State relations) and popular religion (i.e. liturgy, iconography, public and communal rituals). Greece also has a somewhat exceptional socio-religious profile compared to the Western European religious model of secularisation and religious modernity/post-modernity. Greece did not directly experience the Renaissance, the Reformation or the Enlightenment and is the only Orthodox country not to have lived through Communism. Greece’s position in the world can be described as somewhat exceptional: it is at the origins of the classical tradition but also ambivalent towards the Western world that espoused it in its mores and values.

Greek orthodoxy

Greece is a relatively homogeneous country in religious and ethnic terms, especially compared to the more diverse ethnic and religious composition of some other European countries: official statistics estimate that approximately 95 percent of the Greek population are Orthodox Christians (out of a population of approximately 11 million). However, it is estimated that up to 10 percent of the Greek population may actually have other, non-Orthodox, religious beliefs. The degree of religious and national homogeneity is expected to change, as Greece is receiving an increasing number of immigrant populations from different religious and ethnic backgrounds. This recent influx of immigrants will challenge the traditional tendency to view

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91 Sotiropoulos 2003/interview.
92 Sotiropoulos 2003/interview.
93 For a more analytical account of the Greek Orthodox landscape, see Makrides/Molokotos Liederman 2004.
"Greek Orthodoxy as a marker of Greekness." The largest religious minorities in Greece include: Muslims (concentrated in Thrace, Northern Greece), Catholics, Jehovah’s Witnesses, Protestants, Jews, and Old Calendarists. According to Article 13 of the Constitution, freedom of conscience and religious worship are guaranteed for “known” religions (namely Judaism, Islam, Catholic and Protestant denominations), and proselytism against or in favour of any religion, including Orthodoxy, is illegal and punishable by law. Licensing for the building or operation of non-Orthodox places of worship requires the authorisation from the Ministry of Education and Religious Affairs. There is also a significant degree of syncretism and some growth of new religious movements (New Age, astrology, belief in reincarnation), as well as, Old Calendarists and some small but visible conservative “Neo-Orthodox” elite groups, promoting a theologically conservative and Helleno-centric interpretation of Orthodoxy, as a synonym of Greek identity.

Belief in God remains relatively high: according to the European Values Survey in 1999, 93.8 percent of respondents in Greece believe in God, a higher percentage than the European average (77.4 percent). However, Greek society retains a fairly passive attachment to the Church, with churchgoing (greater among women) reserved mostly for special occasions and religious/national holidays. This fact underscores the importance of popular Orthodoxy as a diffuse cultural, spiritual and historical frame of reference for Greek society, even among Greeks who are not religious. Religious practice is relatively higher than most other EU countries
and according to a recent Greek study, church attendance between 1985 and 2000 has shown signs of growth rather than decline. Rites of passage are almost exclusively performed by the Church, particularly baptisms and religious burials. Demands for civil burials and cremations are increasing and, although, civil burials are permitted by law, cremations remain illegal. Although civil marriage was established by law in 1982, only approximately 10 percent of marriages are civil as Greeks prefer to have their marriages performed in the Orthodox Church; according to the European Values Survey in 1999, 89.6 percent of respondents in Greece (European average: 73.6 percent) wanted a religious service for marriage.

The Church of Greece

Quite apart from the influence of Orthodoxy as a faith and popular religion in Greek society, the institution of the Church of Greece and its relations with the State complete the religious landscape of contemporary Greece. The creation of the Church of Greece coincides with the birth of the modern Greek state, which became independent from Ottoman rule in 1827, after which, the Church of Greece declared itself independent from the Patriarchate in Constantinople in 1833. However, the independence of the Greek Church was undermined by the fact that it was placed under the authority of the Greek State, namely the Ministry of Education and Religious Affairs. Placing the Church under the Ministry of Education originated in the idea that spiritual faith and education together were essential foundations for the construction of the newly created modern Greek State. The close relationship that developed between religious and political leaders drew the Church into the turbulent political history of Greece. After the revision of the Constitution in 1975, which is still in effect today, the Church became more independent under a revised administration system (law 590/1977) that limited the power of the Greek State over Church affairs.

The Church of Greece is one of the 5 administrative jurisdictions of Greek-speaking Orthodoxy, the Ecumenical Patriarchate of Constantinople (Istanbul), the Patriarchates of Alexandria and Jerusalem, and the Churches of Cyprus and Greece. The proper jurisdiction of the Church of Greece consists of all territories of the

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2002, Lambert 2002). Greece was not included in the previous European Values Surveys (conducted in 1991), so the 1999 figures do not allow any comparisons with previous years.

110 Georgiadou and Nikolakopoulos 2001. Also, the monastic life in Mt. Athos is undergoing something of a revival and some monasteries are now being restored with new recruits coming from Australia and America and traditionally orthodox countries.

111 Stavrou 1995. According to the European Values Survey in 1999, 92.5 percent of respondents in Greece (European average: 82.3 percent) want a religious service at the time of death, while only 69.1 percent (European average: 74.9 percent) want a religious service at the time of birth (Halman 2001, Lambert 2002).

112 For more details on cremation in Greece, see Dargentas 2003.

113 Makrides 2003.


115 Papastathis 1999.


117 Papastathis 1999.
Greek state except the following: the semi-autonomous Church of Crete; the Church of the Dodecanese islands (south-eastern part of Greece), which became part of the Greek state as late as the early 1900s; and the monasteries of Mt. Athos, in northern Greece, (an autonomous governing body). These 3 separate jurisdictions remain under the supervision of the Ecumenical Patriarchate in Turkey. Today, the Church of Greece is administered jointly by the Holy Synod consisting of all functioning bishops (81 in number), and the Resident or Permanent Holy Synod, which conducts the executive affairs and is composed of 13 members (including the Archbishop of the Church of Greece at its head).

Under the authority of the Permanent Holy Synod there are 12 Synodical Committees and 12 special Synodical Committees, which deal with the different issues raised by the Permanent Holy Synod and execute its decisions; each of these Synodical Committees includes one or more boards of approximately 6 members. In addition to the General Secretariat (including 6 Synodical services: the Chief Secretariat, the Bureau of Ecclesiastic Formalities, the Bureau of Authorisations, the Bureau of Historic Archives, the Holy Synod Library and the Committee of Activities), the 11 Synodical Committees are dedicated to: Ecclesiastic Art, Music and Christian Monuments; Worship and Pastoral Activities; Dogmatic and Canonie Issues; Monastic Living; for Christian Training and Youth; Inter-Orthodox and Inter-Christian Relations (Bureau for Mutual Assistance and Relations with Other Churches, Centre for Support to Repatriated Emigrants, Ecumenical Programme for Refugees); Ecclesiastic Education and the Instruction of Clergy; the Media, Information and Public Relations; Sects, for Community Welfare and Benefits, and for Economics. The special Synodical Committees deal with issues including: Women’s Issues, European Issues/Representation of the Church of Greece in the European Union, Bioethics, Ecclesiastic Arts, Human Rights, Marriage, Family, Child protection and Demographic Problems, Pastoral Issues (AIDS, Drugs, etc.) and Special Situations (Infirmaries, Prisons, Army, Seafarers, Mourners etc.), Christian Monuments, Divine and Political Providence and Ecology, Liturgical Rebirth, and Cultural Identity. The two departments of the Church’s financial administration and control are separate services but also under the supervision of the Permanent Holy Synod.

Under the administration of the Holy Synod can be found other ecclesiastical organisations with social and educational functions, such as: the Orthodox Mission of

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118 The Metropoleis Neon Choron (dioceses of the New Territories) in northern Greece (Thessaly, Epirus, Macedonia and Thrace), which became part of Greece after the Balkan wars, did not come into the full jurisdiction of the Church: although these metropoleis belong geographically to the Church of Greece, canonically they remain under the supervision of the Ecumenical Patriarchate, which retains the right to approve the final election of the bishops proposed by the dioceses. In October 2003, a crisis emerged between the Archbishop of Greece and the Ecumenical Patriarch on this issue of the Patriarchate’s approval of the candidate lists for the election of the metropolites in northern Greece (Thessaloniki, etc.). The conflict may have significant consequences for the Church of Greece and the Greek State and their future relations with the Patriarchate.


120 The Church has established the Hellenic Center for Biomedical Ethics (HCBE) for “the acquisition of academic knowledge on related fields, the understanding of all dimensions of the new and future applications of biomedical research and the search for answers or the proposition of alternative solutions on the emerging dilemmas”, under the auspices of the “Synodical Committee on Bioethics”.
Apostoliki Diakonia, the Church’s Inter-Orthodox Centre, Solidarity (the Church’s NGO) and the Church’s Education and Communication Service (responsible for the Church’s publications, radio and television programmes, and web site).

Other organisations or services, which are not directly or formally part of the Church of Greece but which deal with religious affairs include: the 2 university faculties of theology (in Athens and Thessaloniki) and 3 government departments dealing with religious issues: the General Secretariat for Religious Affairs at the Ministry of Education and Religious Affairs (which is also responsible for running ecclesiastical schools), and two other smaller Secretariats at the Ministry of Foreign Affairs and at the Ministry of Cultural Affairs.

With the exception of the Church of Crete, the Church of the Dodecanese islands (representing a total of 14 metropolises) and Mt. Athos (which all remain under the jurisdiction of the Ecumenical Patriarchate), the jurisdiction of the Church of Greece encompasses a total 81 metropolises, corresponding to different geographical areas, each one comprising of a number of local parishes (total of approximately 7,945 parishes). Adding those, which belong to the Church of Crete and the Church of the Dodecanese islands, under the jurisdiction of the Ecumenical Patriarchate, there are a total of 94 Greek Orthodox metropolises in Greece and approximately 9,330 parishes (excluding Mt. Athos and other monasteries). Finally, the two Chaplaincies in the Armed and Police Forces are also part of the Church of Greece; each one comprises dedicated clergy and staff dealing with religious and ecclesiastical issues (including worship, training, etc.) pertaining to the army and police forces.

The Church of Greece seems to benefit from a healthy financial situation. The Church is supported financially by the State (the Ministry of Education and Religious Affairs), which pays the salaries of all clergy and support staff; it also approves the licensing of all church buildings. However, the complete annual financial report and budget of the Church is not published in the official government newspaper (Efimerida tis Kyverniseos) and is, thus, not available to the public for consultation. According to a recent report by the financial director of the Church administration itself does not seem to keep detailed records and statistics on the total number of people (clergy and support staff) it employs. According to the Church’s 2004 year book (Diptycha), there are 8,515 parish priests in the Church of Greece and an additional 81 metropolises (excluding the Church of Crete and of the Dodecanese islands and Mt. Athos) (Diptycha tis Ekklesias tis Ellados, 2004, 125). Additionally, there is a large network of volunteers (mostly women) who assist the Church in the variety of social services it offers.

121 Diptycha tis Ekklesias tis Ellados, 2004, 1235.
122 The total number of metropolises for these 2 church jurisdictions is: 9 for the Church of Crete and 5 for the Dodecanese islands, thus, a total of 14 metropolises (Diptycha tis Ekklesias tis Ellados, 2004, 922–989).
123 According to our own mathematical calculation, it is estimated that on average there are approximately 99 parishes per metropolis (this figure can vary according to the size of each metropolis), thus, approximately 9,330 Greek Orthodox parishes in Greece.
124 There are approximately 475 monasteries in Greece (not including the monasteries in Crete, the Dodecanese islands and Mt. Athos): 216 male monasteries with approximately 1,041 monks and 259 female monasteries with approximately 2,300 nuns (Diptycha tis Ekklesias tis Ellados, 2004, 1235).
125 According to another unofficial source, there is approximately a support staff of at least 600 people (lay employees, including accountants, administrators, superintendents, cleaners, etc.) in Greece (excluding the Church of Crete and of the Dodecanese islands and Mt. Athos).
126 Papastathis 1996.
Church of Greece, as reported by Greek newspapers, there is a continued, but nevertheless decreasing, surplus in the Church’s finances: in 2003 the Church’s surplus was 4.2 million euros, down from its 2002 surplus of 6.8 million euros.\footnote{In 2003, Church revenue was 13,065,461.44 euros, expenses were 8,793,213.21 euros, leaving a surplus of 4,272,248.23 euros (\textit{Apogevmatini}, 4 March 2004).}

The Greek Constitution is declared in the name of the Holy Trinity and, according to Article 3, the “dominant” or “prevailing” religion of the Greek population is Eastern Orthodoxy under the authority of the autocephalous Church of Greece, which is united spiritually with the Ecumenical Patriarchate. The Constitution stipulates that the Church of Greece is a public legal entity (\textit{nomiko prosopo dimosiou dikaiou}) with exclusive territorial holdings (Article 18); it also grants the Greek Orthodox Church legal and financial privileges (such as tax and military service exemptions for Orthodox clergy) compared to other non-Orthodox Churches in Greece.

In addition to frequent blessings and liturgies on school grounds by members of the Orthodox clergy, weekly religious instruction, regular religious assemblies (prayer) and church attendance are mandatory in primary and secondary education in both the public and private sector:\footnote{Dimitropoulos 2001, 145–151, Sotirelis 1998, Molokotos Liederman 2004.} Religious education consists essentially of an Orthodox interpretation of Christian faith and social issues.

Therefore, Greek Church and State relations are close and the influence of the Orthodox Church, both as an institution and as a cultural and spiritual factor, is highly acknowledged and taken into consideration by Greek political milieus. The Church expects State support through the Constitution and other legal and financial means, just as the State can use the Church as a homogenising and unifying force, particularly in moments of crisis.\footnote{Kokosalakis 1996.} More specifically, the State normally acknowledges, both in principle and in practice, the participation of the Church, as an official partner, in social welfare, accepting the official representation of the Church in various state social policy committees.\footnote{Dielias 2003a.} However, throughout modern Greek history the political authority of the State and the spiritual leadership of the Church have collided. For example, the socialist government was successful in establishing by law civil marriage (1982) and divorce (1983), following the strong protest of the Church, which eventually had to withdraw its negative position.\footnote{Dimitropoulos 2001.} Additionally, the administrative separation of Church and State and the expropriation of Church properties by the socialist government in 1981, posed tremendous political and social risks and the government had to compromise after realising it had underestimated the influence of the Church over the Greek electorate and society. The potential separation of Church and State is still under discussion today and the issue of expropriation of Church property was only partially materialised at a considerable political cost,\footnote{The expropriation of Church property (land) has been a controversial issue since the reforms implemented by Mauer, under the reign of King Otto, resulted in the closure of hundreds of monasteries and the seizure of ecclesiastical property and land, which many Christians had entrusted to the Church during the Ottoman Empire. The State expropriation of ecclesiastical property has been typically justified by the argument that the poor financial situation of the} remaining an essential consideration in Greek Church and State
The underlying assumption today is that the Church has to use its property and assets in order to carry out and fulfill its general social work.

Orthodox theology and social service

Before referring briefly to Orthodox social theology it is important to note that the Orthodox Church considers and understands itself as the unbroken and undivided continuation of the ancient faith, spirituality and Church, the true Apostolic Church of Christ. Orthodoxy, meaning orthi doxa (correct opinion/doctrine), traditionally designates the loyalty to the authentic message of Christ, transmitted to the Church by the Apostles in the Scriptures. Orthodoxy does not seek to revise its doctrine or reform itself through secularisation, but rather to transcend the times by continuing in various circumstances to help the “faithful in their struggles to preserve their existence, to free themselves from alien domination.” This fact – an apparent, at least, resistance to change – goes some way towards explaining the relatively weak, emphasis on social issues within the Orthodox Church.

Orthodox theologians have often referred to the historical limitations of Orthodox social service. For example, Jean Meyendorff has noted that the reputation of Eastern Christianity is its detachment from historical realities and its dedication to mysticism and contemplation. The Eastern Orthodox tradition has typically looked inwards and “above” the affairs of this world; it tends to be mystical, placing more emphasis on salvation and on the celebration of rites and sacraments, and less on direct missionary action or social service, as is the case in the Western tradition. The Greek monastic tradition epitomises this approach, with Orthodox monasteries in Greece functioning as places of a higher Orthodox spirituality. Monks abstain from material issues in order to devote themselves more fully to a spiritual life dedicated to liturgy, prayer and penance, as well as, Byzantine iconography. However, the Orthodox tradition is not distant from the theology of social service. Historically speaking, since the early Church, Orthodox

newly created Greek State required the sale of Church land with the proceeds to be allocated to various social causes, including education. In the 1950s under the threat of stopping all payments to ecclesiastical personnel, the Church agreed to give away a substantial amount of land. In 1987, under the argument that the remuneration of the clergy was a great burden to the national budget, the Socialist government proposed a controversial legislation (law 1700/1987) for the expropriation of a large part of Church property. The bill was amended a year later and the State was able to obtain some Church land but the case was brought to the European Court of Justice. The issue is currently unresolved and inactive but remains a sore point that is often used by political parties and governments as an argument for postponing any further amendments in the regulation of Greek Church and State relations (Dimitropoulos 2001, 111–128).

133 For a more extensive and analytical account of Church and State in Greece, see Anastassiadis 2004.
135 Scouteris 2004, 1.
136 Dimitriu 1994, 2.
137 Quite notably, one of the most progressive-minded leaders in the Orthodox Church – Archbishop Anastasios Yannoulatos of Albania – has written a paper aimed to redress those trends within the Church which resist ‘change’ to such degrees as to bar basic social progress within the Church. See Yannoulatos, ‘The dynamic of universal and continuous change’ (see below, for Yannoulatos’ specific attention to equality between the sexes as a healthy ‘change’ which the Church must embrace).
thinkers and theologians have expressed themselves in various ways on Orthodox social theology; therefore, Orthodox social theology and service can be found in forms that are somewhat distinct from the social theology and service of Western Christianity (Protestant and Catholic Churches).

Beyond distinctions between Eastern and Western Christianity, it is also important to note diversity within Orthodox approaches to social theology and service. As one Orthodox theologian explains: ‘There is no single Orthodox social and political theology, given the diverse character of Orthodox Christianity, extending over so many centuries and localised in so many countries now including western Europe and North America.’ Accordingly, in his contribution to the Blackwell Companion to Political Theology, he chooses to explain ‘Orthodox social and political theology’ with reference to the lives and work of three Orthodox individuals (Father Sergius Bulgakov, Paul Evdokimov, and the recently canonised Mother Maria Skobtsova – the lives and work of whom, according to this theologian, ‘embody some of the most basic and singular of Eastern Orthodoxy’s understandings of the world and life in it’).

In spite of such seeming ambiguity in Orthodox social theology, one concept does remain as a cornerstone of Orthodox understanding of social mission as a whole: that of *diakonia* (social service). In Orthodox theology, *diakonia* is understood “as not simply a social action, but also a theological and sacramental event.” *Diakonia* is a liberation for salvation, liberating and delivering mankind from every obstacle (poverty, oppression, injustice, etc.) jeopardising man’s salvation. In practice the concept of *diakonia* has been usually translated as philanthropy and charity, as a spiritual virtue of the Orthodox Church, which has usually offered its assistance locally during moments of crisis (e.g. after natural disasters, etc.), with limited outreach and in un-organised forms, thus, operating primarily at a local-

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139 The work of Bishop Hierotheos, in a monograph entitled *The Mind of the Orthodox Church* (Hierotheos 1998) offers insight into diversity within expressions, and *conceptions*, of Orthodox social theology: ‘We divide theology into neptic and social, and we regard some Fathers as belonging to the first and others as belonging to the second category. But in the teaching of the holy Fathers [patristic theology] this division is not seen’. Hierotheos goes on to note that a division can be seen in terms of outward appearance of the way Fathers of the Church ‘worked’ (e.g., some had a particular flock, whilst others were in the desert, praying constantly), but ‘even from this aspect…there cannot be a perfect division, because even the Fathers who worked pastorally lived neptically, and the hermits worked in a missionary way, in the sense that they were magnets for many men who approached them to learn “words” of salvation. Thus the hermits indirectly did pastoral work’. Furthermore, he mentions that ‘we are accustomed to seeing the Three Hierarchs [Basil the Great, Gregory the Theologian, and Chrysostom] as social Fathers’, but even this is, in his view, wrong, because in their writings even these Fathers explain the neptic teaching of the Church. In other words, Hierotheos’ work reveals an ambiguity, even within the Church, in the use of such terms as ‘the social’, and ‘social theology.’

140 Belopopsy 2003, 1. One notable example of such distinctiveness is one Orthodox theologian’s paper on ‘Orthodox Spirituality and Social Activism’, in which he puts forth three concepts through which the Orthodox believer could practice social activism as linked to Orthodox spirituality: eschatology (‘the last/final things’); silence; and detachment (see Chryssavgis 2004). Clearly, this proposed perspective on social activity is vastly different from the concepts, and vocabulary, one might encounter in work on this subject from within other Christian traditions.


142 Belopopsy 2003, 11.

parish level, namely at a “microdimensional” level (microdiakonia – see below). Orthodox diakonia has developed in various geographical areas (Eastern Europe, the Balkans, Russia, etc) and historical periods: in Byzantium, during the Ottoman period, the nationalisms of the 19th century, the communist regimes for much of the 20th century and, more recently, in the post-communist period with the return of the Orthodox Churches in the public sphere, as political, cultural and social actors.

An important milestone, which marked a change in the overall Orthodox social theology and service was a 1978 international conference on “An Orthodox Approach to Diaconia” at the Orthodox Academy of Crete, in Greece, upon the initiative of the Commission on Inter-Church Aid, Refugee and World Service (CICARWS) of the World Council of Churches (WCC). This conference was of great importance, first, in acknowledging the need for the Orthodox Church to engage more actively in social service in a variety of complex situations, and, second, in developing further the social mission of the Orthodox Church and in formulating a more concrete doctrine and social action on Orthodox philanthropy and diakonia (locally, regionally and internationally, using material and human resources, in a preventative and therapeutic manner). Another important contribution of the conference was the distinction between the Church’s “microdiakonia” at the individual and community level (offering charitable assistance to individuals and small groups in distress) and “macrodiakonia,” as the Church’s larger commitment to and mission for a fellowship of solidarity, social justice, liberation and salvation.

Therefore, since the 1980s there has been a further development in the social responsibility and engagement of the Orthodox Churches. A striking example is the intervention of the Ecumenical Patriarch on several issues, such as ecology, peace, globalisation, and social justice. The role of the World Council of Churches also has to be noted, particularly in the development of an Orthodox theological framework on social service (for example, the formulation that bishops and priests are required to be actively engaged in social problems and demonstrate public and practical acts of philanthropy) and in assisting Orthodox Churches in the development of their own diakonia programmes. Indicative of this renewed interest and movement in Orthodox social service is the May 2004 conference on “Orthodox Diakonia” in Finland, organised by the World Council of Churches, the IOCC (International Orthodox Christian Charities) and Ortaid (voluntary association linked to the Orthodox Church of Finland). The conference addressed a variety of topics, including Orthodox social theology, the traditional social forms diakonia in the Orthodox church, Orthodox approaches on social, political, of justice and human rights, and the link between church-state relations and social policy. It involved 80 participants.

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144 This may be one factor explaining the lack of Orthodox international NGOs offering humanitarian aid on a large international scale, with the recent exceptions of the North American organisation, International Orthodox Christian Charities, and of the NGO of the Church of Greece, Solidarity.
145 For a more complete historical account of Orthodox social service and pastoral work, see Belopopsky 2003 and Papadopoulos 1978.
from over 25 Orthodox and Oriental Churches and church-related organisations. The purpose of the conference was to explore the history, theology and present reality of Orthodox cooperation in the area of social justice and outreach, to share experience and methodologies, and to foster new forms of collaboration and exchange among Orthodox social initiatives and organisations worldwide. Amongst the keynote speakers was Fr. Demetrios Constantelos (a leading academic specialist on the history of Orthodox social ethos), who emphasised the centrality of concepts such as diakonia, philanthropy and social justice to the history of the Orthodox Church (particularly in the Byzantine Era). Each of the participants took part in one of five working groups (on Orthodox social theology; pan-Orthodox cooperation in diakonia; Orthodox Church and civil society; Orthodox practice and methodologies of social action; and Church management, stewardship, and accountability). At the end of the conference, each working group presented a report outlining priorities, recommendations, and issues requiring further study with respect to the given theme. The results of these working groups may be considered important indicators of the direction the Orthodox Church is taking in terms of strengthening pan-Orthodox cooperation in its social activity, pursuing closer links to agents of social welfare beyond the Orthodox Church (both secular and religious), and aiming for social justice by taking preventative measures in addition to providing philanthropic assistance. Quite significantly, the participants voiced a clear will to continue the efforts begun in Valamo; a steering committee was thus created for the continuation of the conference’s work.

Beyond these examples, there are also developments at the academic level towards an ‘opening up’ of the Church in terms of its social mission. One notable case is the recent publication of an edited volume on *The Orthodox Churches in a Pluralistic World*. The text consists of both Orthodox and other Christian perspectives on the distinctive role to be played by the Orthodox Church in contemporary, increasingly pluralistic, society. In his own contribution to this text, its editor claims that ‘Orthodox theologians, usually reluctant to address issues of social structures, have begun to reflect on the challenge of globalisation and its cultural and social implications.’

### Orthodox theology and gender

Prompted by a general interest in the women’s movement and feminism in the West and how they particularly relate to Orthodoxy, the Orthodox Church organised a

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149 See www.orthodoxdiakonia.net for further information.
150 Amongst the results and future actions to be taken – as affirmed by all participants at the end of the conference – were: to welcome the process and to commit to deepen reflection and collaboration in the area of Orthodox social witness and service; to strengthen education, training, sharing of resources and information on diakonia; to raise consciousness that all members of the Church have a responsibility for diakonia; and to move towards the formation of a network of Orthodox diakonia, with the responsibility of developing the objectives and identifying resources for follow-up activities.
151 Clapsis 2004.
first International Symposium on Orthodox Women in Romania in 1976, followed by a 1988 Inter Orthodox Symposium in Greece on the Orthodox position on women’s issues. Since then, several other conferences have taken place, including the ones in Rhodes (1988), in Damascus (1996) and in Istanbul (1997). These meetings have collectively stressed the need for the further participation of women in local parishes and national and international ecclesiastical committees, the support of the work of women in theological research and the reintroduction of deaconesses. Although Orthodox theologians have suggested and discussed the revival of deaconesses with a specific social role, along with the active involvement of laymen, laywomen and young people in the Church’s diaconal service, there have not been any concrete initiatives yet to develop the female diaconate. This means that as of yet there are no female deacons in most of the Orthodox churches, including the Greek one, (with the exceptions of Coptic and Syrian Orthodox churches, where they exist in some forms). All these developments have unavoidably influenced the Greek Orthodox Church to address women’s issues more actively. As a result, in 2002 the Church of Greece established a “Special Synodical Committee on Women’s Issues,” as a general body for the reflection on and follow-up of contemporary women’s issues.

Given the claim of Greek Orthodoxy as an authentic and continuous religious tradition, with no real need for major revisions in its doctrine, feminist theology and spirituality have been rather resisted by the majority of Orthodox theologians, treated as a result and influence of Western theology. According to Metropolitan Christodoulos of Dimitriada (now the Archbishop of the Church of Greece) feminism, in a larger sense, and its attempt to liberate women, primarily in financial and legal terms, is seen as an attempt to overturn the natural order of things; moreover, feminist interpretations of Christianity against the Church’s refusal to ordain women in the clergy are considered as anti-Christian in spirit. Furthermore, men and women are equal and mutually interdependent on each other, but are not the same, since they each have distinct and complementary roles in life. Therefore, the presence of women in the Church is equitable to that of men, but the Orthodox Church does not conceive equality as a “levelling” and a negation of the specificities of each gender. Thus, Greek Orthodoxy has espoused the rule of St.

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153 During many Inter-Orthodox Conferences in Rhodes, in Istanbul and in Crete.
154 Some of the issues that still need to be clarified include the training and ordination of female deacons, as well as the possibility for them to marry. Despite the resistance of some theologians and ecclesiastics, fearing the revival of the female diaconate as a first step towards the ordination of Orthodox women priests, the Orthodox Church has an overall positive view on the re-institution of deaconesses. In fact, a revival of female deacons in the Orthodox Church would not be a true innovation, but rather, a historical return to and adaptation of an original practice by the Early Orthodox Church, which assigned specific and different roles to male and female deacons. Until approximately the 8th century, deaconesses were particularly active in teaching, in the ministry, in pastoral care and in social work but were not able to move up into the higher ranks of the diaconate to be ordained. In 1952 a School for the training of women deacons was established in Athens but no graduates were ever ordained. See Nolan 1968, Theodorou 1988, Karistoyanes-Fitzgerald 1998, Sotiriu 2004.
156 Metropolitan Christodoulos Paraskevaidis 1986.
158 Arch. Christodoulou September 1999, 1, Metropolitan Christodoulos Paraskevaidis 1986.
Paul, according to which the body has many parts, each one having its own proper function and mission, and collectively contributing towards a general harmony and balance. This parallel is adopted by the Orthodox Church in accepting the principle of specificity, particularly of women and of their particular but central role in the life of the Church.\textsuperscript{159} In that sense, women embody the Church itself, receiving the faithful in its “body” (the shrine). Moreover, the position of the Mother of God (Theotokos), as a role model of the “pure mother” for women in Orthodox theology, is especially venerated and could have provided an example for the ministry of women in the Church.\textsuperscript{160} However, the Orthodox Church rejects categorically the ordination of women, as a result of western feminism.\textsuperscript{161} The Archbishop of the Church of Greece, Christodoulos, specifically argues, first, that Jesus did not select women among the 12 Apostles and that the priest is considered to embody symbolically the body of Jesus Christ, himself, and, second, that it grants women other important functions within the Church, namely in its social and philanthropic work.\textsuperscript{162} “A woman, because of motherhood, teaches us to live as persons, not as units, as relational beings, not as autonomous and independent beings.”\textsuperscript{163} Therefore, according to two women scholars, one theologian, the other a psychologist, the Church affirms the duty of women to realise their natural inclinations towards fulfilling their mission in the world, not towards the absolute “autonomisation” of women but towards the acknowledgement of companionship and the granting of social service, recognising the role of Orthodox women in the area of education and catechism, as well as, in the philanthropic and social work of the Church.\textsuperscript{164} But, according to Archbishop Christodoulos, it must not only encourage the active participation of women in Church life, but also assist and support women in the fulfilment of motherhood, in education, in the workplace and in old age without, however, career development undermining motherhood.\textsuperscript{165} Marriage, motherhood\textsuperscript{166} and family are thus seen as true liturgical events and as the ways for women to become true partners of God.\textsuperscript{167}

Yet, such statements are clearly made in effort to redress an obvious imbalance in perceptions of the proper roles of men and women that have prevailed within the Church (or, at least, within the social structures built by individuals in an around the Church). Another example of such counterbalancing effort is that of Archbishop Anastasios of Albania, in a speech that bears the subtitle ‘Much in human life needs

\textsuperscript{159} Arch. Christodoulos September 1999, 1.
\textsuperscript{160} Sotiri 2004, Dubisch 1990, 132.
\textsuperscript{161} Arch. Christodoulos September 1999, 1.
\textsuperscript{162} Another example is the Church’s rejection of the EU’s 2003 resolution contesting the prohibition of women’s entry in Mount Athos, as harmful to Greece’s religious specificity and an attempt to influence the Greek Orthodox faith with Western theological and feminist principles (see Sotiri 2004).
\textsuperscript{163} Arch. Christodoulos September 1999, 4–5, Metropolitan Christodoulos Paraskevaidis 1986, 23–25.
\textsuperscript{164} Arch. Christodoulos September 1999, 4.
\textsuperscript{166} Metropolitan Christodoulos Paraskevaidis 1986, 20.
\textsuperscript{167} In that sense, abortion is seen as a violent act, in direct contradiction to God’s will for childbearing. Furthermore, the Church of Greece has using Greece’s low birth rates as another argument against abortion (Lekkos 1991).
to change.' Archbishop Anastasios refers here to patristic theology, and to the writings of the ‘Three Hierarchs’ (Basil the Great, Gregory the Theologian, and John Chrysostom – all 4th century Orthodox Church leaders), to argue emphatically in favour of equality of the sexes.168

As more and more women are studying theology,169 and thus, progressively creating a small circle of academic women theologians both inside and outside Greece, it seems that, given the Greek context and according to one scholarly view, Greek theological schools seem to have undergone a process of relative “feminisation.”170 However, “very few of these women have voiced a concern or actively sought the participation of their gender in the priesthood.”171 This brief theological summary of the official Greek Church’s position on women has indicated that the role of women in Orthodoxy is improving at a grass-roots level, particularly because of the flexibility and adaptation which characterises Orthodoxy (the principle of oikonomia) with the non-strict and non-rigorist practical application of religious rules. While there are still no deaconesses, it is important to underline the great diversity of women’s voluntary services, indicating a commitment in assisting the Church in all of its diaconal and charitable activities. However, based on the previous statements and texts by the Archbishop of the Church of Greece on the role of women in the Greek Orthodox Church, it seems that even if Greek women are increasingly involved in the educational, administrative and charitable social activities of the Church at the parish level, their function, nevertheless, remains one of a supportive role to the mission of a male ordained clergy.172 Hence, there is a certain tension between the “male-dominated institution” of the Church and the important role that women play in the spiritual and physical well being of the family, as providers of social care.173

Welfare provision by the Church of Greece

The historic role of the Church in the development of the newly created modern Greek State has already been underlined. It is particularly important to underscore here its role in responding to the social needs of the Greek population, such as donating land for building many hospitals, schools and orphanages and providing

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169 But “the growing number of female theology students is not the result of an increased interest in theological matters by women but rather the outcome of the specificities of the system pertaining to entrance exams in Greek Universities” (Sotiriou 2004).
170 Sotiriou 2004. This view is also supported by the fact that, according to senior faculty at theological school of the University of Athens (Constantine Skouteris), 52 percent of the students are women, when in the past this percentage was much lower (exact statistics are not available at this time). Related to this trend is the fact that the theological school in Athens has created a graduate programme on “Gender and Religion”.
material assistance to those in distress at a local parish level.\textsuperscript{174} As early as 1829, just a few years after Greek independence, cooperation between the Greek Church and State in social matters is visible in the creation of the “Secretariat for Religious Affairs and National Education” aiming at the social and political restoration of the country.\textsuperscript{175} However, during most of the 19th century the position of the Church was relatively weak, partly because the expropriation of Church property (land) through the reforms implemented by Mauer, under the reign of King Otto, resulted in the closure of hundreds of monasteries and the seizure of ecclesiastical property and land that many Christians had entrusted to the Church during the Ottoman Empire.\textsuperscript{176} It was primarily during the inter-war period, and particularly after the Second World War that the Church of Greece further developed its charity work. In 1941, the Greek Church created a national organisation of Christian aid (EOXA), which provided food, clothing, shelter and children’s homes to those in need.

The 1977 legislation (law 590/1977) that restructured the Church’s administration system is significant vis-à-vis the Church’s official social role, through a direct reference in the law to the Church as an official State partner in the provision of social protection, which is acknowledged formally by the State and to the creation of a Synodical Committee for Social Welfare.\textsuperscript{177} Finally, the creation of the National Administration of Ecclesiastical Property (ODEP) is responsible for making use of the Church’s property towards the implementation of its social, spiritual and charitable activities and tends also to acknowledge a need for harmonisation between the Church’s social mission and public social policy.\textsuperscript{178}

Up until the late 1970s, the Greek Orthodox Church was not actively participating in any public debates on social policy and expressed occasionally theoretical social principles, such as philanthropy as a spiritual virtue, while occasionally offering assistance at a local level during moments of crisis or emergencies.\textsuperscript{179} The renewed interest and movement in Orthodox social service, as already indicated, has unavoidably induced the Greek Orthodox Church to address social issues more actively. In the early 80’s, there was a change in the Greek Church’s position towards formulating a more concrete doctrine on philanthropy and diakonia on various social issues but, with the exception of some theologians who wanted a more active social engagement, its participation in social debate remained theologically oriented.\textsuperscript{180} In 1977 the Church created a Synodical Committee for Social Welfare issues, the “Synodical Committee for Social Welfare and Benefits.” It is comprised of a liaison officer (currently, the Metropolitan of Nikaia, Alexios) and approximately 5 members and 5 reserve members (including clergymen and

\textsuperscript{174} Martyria ts Agapis 2001, 26–27.  
\textsuperscript{175} Diellas 2003a, 2.  
\textsuperscript{176} Dimitropoulos 2001, 56–61.  
\textsuperscript{177} Diellas 2003a, 3. According to some Greek academics, the current status of the Church as a legal public entity (nomiko prosopo dimosiou ditaios) restricts the social mission of the Church, as many of its social activities and programmes are subject to long bureaucratic procedures, requiring the approval of the Ministry, and necessitates an amendment of the current Church’s financial administration system (see Diellas 2003a).  
\textsuperscript{178} Diellas 2003a, 3.  
\textsuperscript{179} EIWSR 2001, 28.  
\textsuperscript{180} EIWSR 2001, 29.
non-clergy). Its role is to primarily research and study social problems and develop proposals for addressing these issues, rather than to coordinate and control the Church’s social activities. The related “Synodical Committee for Marriage, Family, Child Protection and Demographic Problems” and the “Synodical Committee for Women’s Issues,” also deal with various related social issues and seem to act more as “think-tanks,” rather than coordinating bodies. After the 1990s, the Church’s social engagement has been more pronounced and active; the election of the Archbishop of the Church of Greece, Christodoulos, in 1998, replacing Archbishop Sarapheim after his death, is credited with a more active development of the Church’s involvement in social issues through more concrete social action and official social theological statements in response to social issues and needs.

Article 8 of law 2646/1998 confirming the Church as an official member of the Greek Council of Social Welfare, is indicative of the Church’s renewed and strengthened role in social welfare. This is more concretely put into action in the Church’s 2002 proposal to develop welfare activities in cooperation with the Greek state, financed by the third Community Support Programme (funded by the EU).

The frequent social theological statements issued by the Church are part of a larger framework of Greek Orthodox theology, which considers itself as a *martiria*, a witness, to the theology of the early and medieval Church. The true and authentic Christian faith is expressed with acts of love, which are a fundamental aspect of Christian life, a life of faith and love towards our fellow men and God. “Orthodoxy without works is theory without substance, without life.” Christian philanthropy, as an application of Christian love, leads man to an existential meta-

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181 According to the church’s web site, the activities of the Synodical Committee include: “Research on and examination of contemporary social problems and the drafting of proposals on the most efficient methods of facing these problems, at the levels of the Church of Greece, of its Metropolises, and of its parishes. – Organising the optimum social, welfare and philanthropic functions of the Church. – Addressing emergency community situations provoked by earthquakes, floods and other disasters, and subsequently organising initiatives for community awareness. – Procurement and operation of storage areas in large cities, for the purpose of collecting first aid items for immediate availability in the aforementioned emergencies. – Organisation and operation of educational seminars for the preparation, updating, training and/or supplementary training of Church staff serving in its social and welfare programs. – Organising conventions and conferences on current social and ecclesiastic issues, aimed at analysing the problems therein and keeping God’s people informed as much as possible, while also projecting the Church’s ongoing activities related to these same problems. – The creation and periodic refreshing of the information database related to the broad welfare activities undertaken by the Orthodox Church of Greece, and the all-media presentation of these activities, for a tangible education of the People of God, the strengthening of their trust towards the Church, and their active support in the continuation of this immense project of serving the destitute. – Technical support to Metropolises, to assist them in the most efficient organisation of their individual welfare programs. – Drafting plans for social welfare interventions for the more afflicted groups of the population (e.g., repatriated locals, gypsies, homeless, unemployed, economic refugees etc.) and their inclusion in financing by European Union sources. – The search for resources and methods of funding for the charity institutions of the Church and its general community and welfare program, both at home and abroad. – The striving for recognition of the Committee as a partner within the European Community, with the ability to participate in the distribution and transfer of every approved funding, both in Greece, as well as in neighbouring Balkan countries”.

182 See for example various speeches of Archbishop Christodoulo on drugs, young people, mental illness, etc. www.ecclesia.gr/greek/solidarity.htm.


morphosis of liberation through God. *Diakonia* is a sacramental event, seen as a “liturgy after the liturgy” and has an interpersonal and collective aspect, providing support to the specific material and spiritual needs of our fellow men, but also creating a larger framework of comprehensive *diakonia*, as a community of solidarity and social justice. Thus, the previously mentioned notions of *microdiakonia* and *macrodiakonia* are used here specifically by the Church of Greece in its own social theology.

Before highlighting the Greek Church’s actual social work, it is important to note a tendency for it to not publicly promote its welfare work, primarily because it takes place at the level of local interaction between the parish priest and individuals. Furthermore, the Church considers publicising its social work to be contrary to the principles of philanthropy and the Orthodox ethos. Therefore, the Church’s organisations and monasteries involved in social activities also tend usually to act locally and informally and, thus, to avoid any type of public visibility of their social work, seemingly being more interested in offering social services rather than receiving public recognition for their work; in this way, they also tend to have an inward focus and operate in a closed network with minimal cooperation with other non-religious organisations involved in similar activities. This tendency has prompted some discussions on the need to create formal cooperation links between the Church and local state authorities and civil society (other formal or informal social service organisations, including NGOs). However, the publication in 2001 of a large volume dedicated to the charitable and social work of the Church, entitled *Martyria tis Agapis* (“Witness of Love”), including a very detailed account and inventory (with text and many photographs and statistics) of all of the Church’s social programmes, some in cooperation with local state authorities, may indicate a change in the way the Church makes its social work publicly known.

The social activities and programmes of the Church of Greece are generally implemented at three levels: (a) national: by seven central Church organisations under the supervision of the Holy Synod (b) regional: by the Archdiocese of Athens and the other 80 *metropolises*, and (c) local: by thousands of parishes and various

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190 Stathopoulos, 1999, 224.
192 Diellas 2003a, 4.
193 The Church of Greece operates 7 central welfare organisations, which are under the supervision of the Holy Synod: "Christian Solidarity" and "Diakonia" (under the auspices of the Archdiocese of Athens), "Solidarity" (the Church’s NGO), the “Hellenic Centre for Biomedical Ethics”, the “Family Support Centre”, the “Orthodox Mission of apostoliki *Diakonia*” (offering missionary type of activities and assistance to various orthodox *metropolises* all over the world established by the Ecumenical Patriarchate, including in Latin American and African countries and in Hong Kong and Asia) and the “Pan-Hellenic Parents Union for the Protection of the Hellenic-Orthodox Civilization, the Family and the Individual”. They provide various forms of social services at a local, national and, even, international level (in the case of the NGO, “Solidarity”).
However, not all Church-related social activity falls neatly within these categories. A great deal of social activity is carried out with the support of the Church (either financial or otherwise) but under the initiative of individuals who may or may not be formally affiliated with the Church as an institution. Such activities are difficult to enumerate, or to categorise. Also, such activities, for the most part, remain out of the public eye: in many cases, only people living within the local context of a given Church-related activity will be aware of the Church’s role.194

At this point, it is significant to underscore the importance of the Church’s local and informal welfare function, through acts of microdiakonia at the parish level, involving not only the interaction between the people and the priests, but also a more direct relationship with the saints through pilgrimages and ritual activities carried out by the pilgrims independently of the church and without any intervention by a priest. The purpose of a pilgrimage (proskynima) is most often for the pilgrim to ask a saint or the Panaghia (Madonna) for the cure or the well-being of a family member (or of the pilgrim himself/herself), including the promise to fulfil a vow (tama), accompanied by a symbolic offering (icons, flowers, oil, wine, bread, etc.) or act (for example, crawling up to the church on one’s hands and knees). The sites of these pilgrimages are places where miracles have supposedly happened (according to popular tales) and may happen again or shrines with miracle working icons.195 In that sense, the direct relationship with a saint or the Panaghia in Greek Orthodoxy, can be seen as an indirect and implicit form of “welfare service” provision at a different, namely emotional and psychological level, having a profound emotional impact and a cathartic effect, fulfilling one’s need for healing and giving hope.

The Church’s social services are put into action by local parish priests and other religious and non-religious staff (paid and unpaid laymen and laywomen), working for the Church in various capacities. Moreover, the Church benefits from a large network of volunteers it has created; according to 2001 statistics, the Church has an active network of approximately 23,000 people who are utilised and mobilised on a regular basis, offering their services to the great variety of social services provided by the Church (recently, in a national campaign to engage volunteers for the 2004 Athens Olympic Games, the State called on the Church to mobilise its own volunteer networks).196

According to a 2001 report on charitable and social work published by the Church itself, in 2001 the Church of Greece operated 190 units dedicated to offering social welfare services (not including summer youth camps and charitable

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194 Diellas 2003a, 4. Beyond the Church of Greece and its affiliated organisations, there are other independent religious associations (Christian Churches and others), which also offer social services to the Greek population (for example, see Panagiotidou 1999).

195 Personal communication, Antonis Papantonis (coordinator of the two Synodical programmes – one offering aid to repatriated Greeks, and the other to refugees in Greece – see below), 22 May 2004. Papantonis raises examples of both successful and failed attempts, in the local contexts of Kefalonia, Mitilini, and Ioannina.

196 Dubisch 1990, 112–139. The most typical example is the shrine of Panaghia Evangelistria in the island of Tinos, one of the holiest places in Greece and a popular site for pilgrimages to the miracle-working icon of the Panaghia (Madonna).

197 Diellas 2003a, 6.
They had a capacity of 7,400 places and accommodated 4,150 people. Most of these units (70 percent) were created in the 1960s or later and headed primarily (60 percent) by clergymen or theologians; the units employed a total of 1,026 permanent staff and many other external associates (paid and unpaid) and volunteers (480 people). These units were specialised primarily in providing social care to the elderly (34.7 percent) and to the poor or homeless (25.8 percent), but also to a lesser extent to young people and children (11.8 percent) and to those with incurable diseases (11.8 percent). They provided services (to more women than men) ranging from shelter, food, clothing, financial assistance, education and training, medical care and cultural/leisure activities. More specifically, the Church offers (solely or sometimes in cooperation with state or local authorities or even European initiatives) informal social services and more formal social programmes in the following areas:

- **Care for the elderly**: this is a very important area in the Church’s social work, as there has been a sharp increase of homes for the elderly since 1995 (for example, between 1995 and 2000 the number of homes for the elderly increased by approximately 39.7 percent). In 2003, the Church operated 81 elderly homes all over Greece, under the auspices of the Archdiocese of Athens and other metropoles, offering a home and medical care, while also trying to create a warm and human environment for people during their last few years of life.

- **“Christian Solidarity”**: charitable funds established by the Archdiocese of Athens and other metropoles; they provide locally, at the parish level, material and other types of support to a variety of individuals (elderly, single mothers, people with special needs, etc), suffering from poverty and financial and social exclusion, such as shelter and food ("soup kitchens"/ˈsisɪtia), scholarships, child and elderly care, blood donations, etc. In 2003, there were 1,839 such funds.

- **Youth programmes**: a variety of programmes and centres to assist young people, including employment search centres, cultural and leisure centres (including an internet cafe in Athens with more to follow), scholarship programmes, orphanages and youth and student boarding houses, drug rehabilitation and counselling centres, and training schools (for computer science, music, accounting, art restoration, painting of icons, etc.). There are “youth bureaus/centres”, some of which run in cooperation with the State (for example, the Ministry of Education) or local state authorities. The Archdiocese of Athens runs Diakonia, a psychological and social support centre, also including specific drug prevention and rehabilitation programmes, with a staff of 30 young people.

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198 For a detailed account of the Church’s social services and programmes, see *Martyria tis Agapis* 2001.
200 The Ministry of Health and Welfare and the Ministry of Labour and Social Protection, as well as, the General Secretariat for Equality (Ministry of the Interior) and the General Secretariat for “New Generation” (Ministry of Education), are primary vectors for providing social services or other related services and information in Greece.
201 This information, which is not an exhaustive account of the Church’s social service, is based on a report, published in 2001 by the Church, on its charitable and social work: *Martyria tis Agapis* "Witness of Love".
202 Diellas 2003a, S.
bishops, external specialists and many volunteers having a special interest in drug rehabilitation. A telephone drug “hot-line” and more extensive collaboration with state drug rehabilitation programmes are also planned. One very important and historic social contribution of the Church has been its summer youth camps, first established in 1911 upon an initiative of the Church, as an essential component in its social mission in Greek society, particularly amongst the youth.203 Since Church summer youth camps pre-existed the ones created subsequently by the State, the State has typically recognised and acknowledged practically and legally the material and human contribution of the Church with land and appropriate dedicated staff and volunteers in this area.204 The Church currently operates approximately 68 summer camps all over Greece, hosting approximately 15,000 children (from Greece and abroad) every year, amounting to approximately 60 percent of the total number of summer camps operated in Greece (in addition to the Church, the State and local state authorities operate a large number of youth summer camps).205 Summer youth camps are organised locally upon the initiatives of metropolises and local volunteers. Furthermore, the Church is the only organisation to provide training of summer camp leaders and counsellors, through the organisation of conferences, seminars and training programmes (such state training centres, operated by the Ministry of Health and Social Welfare, were eliminated in 1995).206

• **Family support programmes**: operation of approximately 20 childcare centres all over Greece and contributions, since 1999, of allowances to families having a third child207 (requiring the Greek citizenship and Orthodox affiliation of the child). The Archdiocese of Athens also runs the Family Support Centre (KESO) established in 1999, offering a centre in Athens where women and families in need can get information and receive assistance from Church units or state-run centres. The Centre also operates: a “mother’s guesthouse” hosting single mothers, abused women or women who are victims of human trafficking and their children (offering them medical and psychological care and legal assistance), a child care centre and a legal aid bureau to provide legal advice to distressed women and families. Finally, the Centre also runs 60 “parent schools” all over Greece (preparing couples for marriage, parenthood and schooling), a children’s theatre and other cultural/leisure activities for children and produces a radio programme transmitted in the church’s radio channel, as well as, various small publications on family issues and parenting. Recently, a special campaign was launched against the human trafficking of women and children.

• **Pastoral services to patients and hospitals (healthcare chaplaincy)**: a large network of hospital priests (healthcare chaplains) all over Greece responsible

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203 Diellas 2003b, 1.
204 Diellas 2003b, 1–2.
206 Diellas 2003b, 1.
207 For the continuation of this family planning programme the Synod decided to raise funds and contributions (in the form of “taxes”) from poor funds of each metropolis, monasteries and pilgrimage foundations, as well as, from the wealthiest parishes. See Anastassiadis 2004, 27–28.
for visiting patients in hospitals, receiving the confession of patients and for providing other social and charitable services, including charitable funds to patients in need of financial assistance. The Church has also established a cooperation link with a large national psychological counselling centre, thus, also addressing and providing social care to the needs of patients suffering from mental illness. Finally, the Church runs approximately 12 homes (sanatoriums and hospices) for chronically or terminally ill patients. It also recently created an information and support centre for people with cancer, which can house them for a few days in an effort to help them create self-help support groups. The Church also organises blood drives on a regular basis, designed to collect and donate blood to blood banks; the Archdiocese of Athens has established a central bureau responsible for the coordination of the Church’s efforts in this area. Blood drives are also active in the various metropolises all over Greece and at a local parish level, as each parish has a 5 member committee responsible for the coordination of blood donations every 6 months.

- **People with special needs**: assistance to individuals with special needs (for example, the blind) including medical care, financial assistance, psychological counselling, institutional care, training and professional occupation and leisure, as part of a wider effort to improve their insertion and integration into Greek society. Some local metropolises, which are active in this area, employ a large number of individuals with special needs (such as in the painting of icons, in gardening, in cooking and kitchens, etc).

- **Humanitarian aid to victims of natural disasters**: significant material assistance (shelter, food, clothing, medical and pharmaceutical supplies, and psychological care) has always been provided by the Church to the victims of various natural disasters, including most recently during the 1999 and 2000 earthquakes in Greece and Turkey.

- **Assistance to vulnerable groups**:
  - **Prisoners**: counselling (regular visits and distribution of relevant literature – pamphlets and books), religious services (performed in the prisons) and material assistance (clothing and other personal hygiene items) provided on a regular basis to prisoners, as well as, financial assistance to impoverished prisoners and detainees who cannot afford to pay penalties for small crimes (approximately 5,800 prisoners and detainees have been released with the financial assistance of the Church). The Church also provides funds to individuals released from prisons.
  - **Repatriates**: the creation of 2 bureaus (in Athens and Thessaloniki), in cooperation with state authorities and European organisations, with different departments offering a variety of services (legal advice, information on social services, education, psychological counselling, etc.). The goal of these centres is also to evaluate, monitor and research (through seminars, conferences, publications, etc.) the needs and problems faced by individuals and families repatriating in Greece, primarily from Western Europe (Germany). In 2000, these centres received a total of 6,955 repatriates.
- **Refugees and immigrants**: development in 1990 of the “Ecumenical Refugee Programme” and cooperation with and assistance to existing European (for example, “Refugee Integration Into European Society”) and state programmes for refugees, offering legal assistance, counselling, Greek language instruction, shelter, employment search help to refugees, primarily from Pakistan, Ethiopia, Iraq, Algeria, Bangladesh, Iran and Nigeria.

This brief description has highlighted the various social care services and programmes provided by the Church to the more vulnerable groups of the population. The actual accessibility, practical application and overall effectiveness of each of these programmes, as they have been described above, have to be further examined and evaluated carefully on-site, through physical visits to the social centres in question and through interviews with those who benefit from them. The detailed case study analysis of Church social welfare activities in the area of Thiva and Livadia is one important step in this direction.

### Situation and policies regarding gender

#### Gender regime and role differentiation

As is clear from the above, the welfare system in Greece reflects the state’s reliance on the prevalence of the traditional family model. Although this family model has been changing, stereotypical expectations of men’s and women’s roles remain largely in place: women are, by and large, still considered to be ‘in charge of’ the household (even if this entails commissioning household help; see below), whilst men are expected to be the primary bread-winners. This fact stands in contrast with trends in western European countries where, in some cases, a role reversal is taking place because of the increased unemployment amongst men and the feminisation of the labour force.208

Well beyond the Greek context, many women are required to leave their employment and/or sacrifice their careers in order to care for a family member(s) at home, thus rendering themselves financially dependent. But because of the patriarchal character of the traditional Greek family, such an unequal division of roles is especially common, to the extent that it has clear repercussions for the health, career and, in general, quality of life of women.209 The underdevelopment of the state welfare system serves to increase the need for this role to be played by women; meanwhile, the tendency of so many women to fill this role has, in effect, perpetuated perceptions of care in the home as the basic ‘duty’ of women. In this

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208 Lambropoulos 1999, 89–90.
209 Lambropoulos 1993, 717, 725.
According to statistics, rates of male participation in housework and childcare are very low. Thus, women are often obligated either not to take jobs, or to interrupt their employment in order to take care of the dependent members of the family. Re-entry into the workforce is difficult because of the inflexibility of the job market, the lack of programmes facilitating professional re-entry, and the lack of services for the reconciliation of professional and family life (eg. services to care for children under 3 years of age cover only 3 percent of the needs in Greece). Furthermore, the discrimination that continues to exist in terms of job allocation on the basis of sex creates generally poor conditions for the hiring of women, whilst their wages are also generally lower than those of men.

Legal regulations promoting gender equality

The principle of gender equality was formally endorsed in Greece in the 1975 Greek Constitution (currently in effect), which states that ‘Greek men and women have equal rights and responsibilities.’ However, significant legal inequalities still persisted after 1975. The most obvious of such inequalities, in the context of the family, were redressed with the family law provisions of 1983 (Law 1329/1983). Until that date, the male spouse was officially the ‘head of the household’ and responsible for every decision to do with married life; meanwhile, the female spouse was solely responsible for the care and functioning of the household. The 1983 law introduced changes towards gender equality in these domains (i.e., since 1983, the male spouse is no longer considered the ‘head of the household’, nor is the female spouse considered solely responsible for care of the household). Additionally, the dowry was abolished; property owned by the couple was no longer only in the name of the male; circumstances allowing and determining the conditions of divorce were drastically modernised (including introduction of the option for ‘consensual’ divorce); and the term ‘paternal power’ (describing the father’s rights to decide on all serious matters do to with the lives of the children) was replaced with ‘parental care.’ Considering the late date at which such conservative laws were amended (1980’s), it becomes clear how patriarchal conceptions of the family have persisted to the extent that they have in Greece.

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210 Lambropoulou 1993, 725.
211 Eurobarometer reports show Greek men and Spanish men as least involved in household work and childcare. Likewise, female participation in the labour market is lowest in these two countries (in spite of their increasingly higher levels of educational attainment). See H. Symeonidou, ‘Wedding-divorce, co-habitation-separation in Greece’, 116.
213 This clause was amended in the 2001 Constitutional Revision: Article 116, paragraph 2 now indicate the state’s responsibility to take specific positive measures for the elimination of discrimination against (especially) women. See Equality of Opportunity Between Men and Women (1983–2000), a pamphlet issued by the General Secretariat for Equality, October 2003.
214 The above represents a selection of elements of the 1983 family law legislation most relevant to this study. For further details, see Family Law, a pamphlet published by the General Secretary of Equality, March 2002.
Equality between the sexes in the workplace was introduced in legal terms in 1984, with Law 1414/1984. This law foresees, amongst other things, equal pay for equal work; equal opportunity for employment (e.g. hiring on the basis of the same requirements for both men and women); and proscription of dismissal from employment for reasons to do with gender. Equality of parental rights within the context of the workplace is also promoted by Greek legislation. Law 1483/1984 (as expanded upon later with Civil Code Article 193/1998 and Law 2639/1998), foresees the granting of parental rights to both parents; granting of leave in order to care for ill children or other ill members of the family; granting of leave for attendance of a child’s school presentation; and proscription of sacking of a pregnant woman during pregnancy and one year after childbirth. Furthermore, Penal Code Article 176/1997 improves measures for the security and health (during employment) of pregnant women, women confined to bed following childbirth, and breastfeeding women (in accordance with Directive 92/85 of the European Community).

Furthermore, with Law 1324/1983, the UN Convention on the Elimination of all Forms of Discrimination Against Women (CEDAW) was ratified; member-states are required to take all appropriate measures in all sectors (especially the political, the social, the economic, and the cultural), to secure full equality, development and progress of women on the basis of equality with men. Subsequently, Law 2952/2001 ratified the Voluntary Protocol of the CEDAW, so that Greek individuals and groups have recourse to the UN Commission specially established for the examination of violations of the principle of gender equality. The CEDAW requires that each member-state submit a progress report to the UN every four years (General Secretariat of Equality Oct 2003). The last available Report is that of 2000 (the 2004 report has not yet been released). This report presents all the activities of Greece in accordance with sixteen Articles of CEDAW, ranging from a programme for social inclusion of Muslim women and children in the Metaxourgeion area (in Athens), to the development of women’s agricultural co-operatives.

In terms of institutional support for gender equality, the Ministry of the Interior, Public Administration and Decentralisation maintains a ‘General Secretariat for Equality’, which is in charge of the promotion and implementation of legal and ‘substantial’ (real) gender equality in all sectors (political, economic, social and cultural). In parallel, the Research Centre on Gender Issues (KETHI) is a legal entity of private law supervised by the Ministry of the Interior and financed from the budget of the General Secretariat for Equality. KETHI’s main purpose is to promote equality of opportunity in employment and economic development; to

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215 This law also entailed the harmonisation of Greek legislation with European Community Directives 75/117 and 76/207.
216 Other such laws include: Law 1609/1986, which legalised abortion (within the first three weeks of pregnancy), and Laws 2676/1999 and 3029/2002, with which the status of pensions was modernised and every discrimination on the basis of gender was abolished. For further details, see Equality of Opportunity Between Men and Women (1983–2000), General Secretariat for Equality, October 2003.
217 See also gopher://gopher.un.org:70/ga/cedaw/convention.
219 For further information on KETHI and its activities, see www.kethi.gr, one may visit the KETHI offices to obtain a copy of the latest CEDAW progress report.
disseminate and implement the policy of equality of opportunity for women and men by conducting scientific studies and research; and to organise vocational training programmes for women. KETHI has a ‘Documentation Unit’, which entails a comprehensive information system on employment and vocational training for women, and an ‘Information Unit’, which provides information and advice on employment, issues. At the regional level also there are ‘Prefectural Equality Committees’ (comprised of representatives of state, local mass organisations and women’s organisations) in individual prefectures, as well as ‘Prefectural Equality Offices’ in each prefecture in Greece. Likewise, thirteen regional equality committees operate (in the capital cities of the regions of the country). Finally, more than 50 non-governmental organisations in Greece do significant work with a range of activities in women’s concerns and equality issues.220

**Bases of taxation and social entitlements**

In general, taxation and social entitlements are based on individual rights. However, there are some significant exceptions. For example, certain entitlements are specific to families with three or four (or more) children. Parents of four or more children receive a monthly allowance from the Ministry of Welfare.221 Mothers of four or more children who are either married or above 23 years of age are granted a life-long pension.222 A special allowance is offered for the care of a third child born into a family, and it is granted to the family until that child reaches the age of six. Families with many (three plus) children are also offered tax breaks, increasing in accordance with the number of children.223 Clearly, such family-based entitlements stem specifically from the demographic problem in Greece, and are designed to boost population growth by providing financial incentives (or, combating disincentives).

There are also several entitlements specific to single parents. Single-parent families with a certain income and below are entitled to an allowance, which increases incrementally with each child beyond the third.224 Furthermore, single parents are aided in access to employment through extra points given them in examination contests, and through prioritisation in programmes offered by the Ministry of Labour. Single parents are also allowed six extra days of annual leave, and their access to social support structures is facilitated (eg., day care and housing benefits).225

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221 Usually, it is the mother who is eligible, on the basis of the number of children she has; but according to a law introduced in 1993, men too are eligible. The same allowance is offered to unwed or divorced mothers with three or more children.
222 One further pension scheme based on the family is that if a man or woman is widowed, and his/her spouse was receiving a pension at the time of decease, then the widower/widow is entitled to the pension of his/her spouse.
223 For further details, see M. Matsaganis, ‘Social policy and family in Greece’, 163, and We Support the Family, a pamphlet issued by the General Secretariat for Equality, December 2003.
224 Matsaganis 2002, 163.
Family-based entitlements exist in other European countries as well. But, in general, they come in the form of allowances which begin with the first child; the allowances continue until children become of age; and rarely are there any income-based criteria for the granting of such allowances (in Greece, only the allowances offered to families with four or more children are comparable, in terms of amount, to those offered in other European countries for even one child).

The influence of social change on the welfare debate

We have described above the traditional trends of gender relations in Greece, and the role these entail for women in the home. Certain changes within the Greek family structure, and within traditional gender relations, have produced a plethora of inter-related, and much-debated, challenges to the contemporary welfare system in Greece.

One range of challenges stems from rising employment rates amongst Greek women. Although female participation in the labour market in Greece remains lower than the EU level, women have been entering the workforce at rapid rates (from 27 percent in 1981 to 41.9 percent in 2001). This increase in female employment has to do with both the increasing education and liberalisation of Greek women, but also with the increasing costs of living and the need for two incomes in order to support a family: employment among younger women with children (ages 20–39) has increased especially (as in other EU countries). This entails, as has been mentioned above, a new gap in care for children and the elderly. The acuteness of this gap is clear when one considers the following figures: only .5 percent of the elderly live in a nursing home (most of the elderly live either with or very near to their children), and only 3 percent of the needs for care of children under the age of three are provided for by the state.

Again, many couples have addressed this problem by helping the elderly (their parents) by housing them, but also seeking the latter’s help by having them care for their children. In general, not only the grandparents, but also the wider family network have played crucial roles in welfare provision in Greece. But this fact is challenged by certain contemporary developments: first, the increasingly aging population (the elderly may only be relied upon up to a point in terms of caring for their grandchildren and, meanwhile, the number of elderly requiring care themselves is rapidly growing); and second, economic migration of young Greek families to large cities, together with the congested living conditions there, often limit access to the wider web of family support which has traditionally provided for family needs.

These developments have generated debates about the inadequacies of state welfare services, particularly for children and for the elderly. Again, the state provi-
sions for childcare are far from sufficient for the growing needs of young Greek families. And though, as stated above, the Greek welfare system has tended to be ‘pension heavy’, still the sums granted to the elderly are not sufficient to provide any degree of independence. Accordingly, childcare and pensions are issues that are high on the public agenda. There is a general trend toward public recognition of both the weaknesses in state social provision and of the extent to which these weaknesses stem from the state’s reliance on women to provide most social services for their families. Increasingly, scholars are highlighting the relationship between the under-developed state social welfare system in Greece and the traditional family:

Traditional families often acted as a redistributive mechanism (pooling resources in favour of members in need), and as a provider of social services (directing female unpaid work to the care of children, the old, the sick). As modern families become less able (and, perhaps, less willing) to perform such functions, the pressure on formal systems of social protection intensifies. Needless to add, demographic change compounds such pressure in the form of higher demands on pension, health and social care systems.

Of course, such developments are not limited to the case of Greece but are, rather, common to southern Europe in general. And, as one scholar argues, the low rates of female employment across southern Europe are indicative of the ‘high social costs’ of the social southern model of welfare. A further ‘high social cost’ is the perpetuation of the demographic problem: as long as provisions such as trustworthy and affordable childcare are not available in sufficient numbers, Greece will continue to face a problem of low birth rates. One other repercussion, not limited to the Greek case but perhaps more developed in the Greek context, is the reliance on migrant women for household duties and care for children and the elderly (this factor will be addressed below).

In light of these various, interrelated and obvious challenges to the welfare state resulting from changes in Greek society, many scholars note the remarkable lack of pertinent response on the part of the state: social provisions remain limited, and do not reflect the real needs within contemporary Greek society. In general, one observes developed debates in the academic sphere and, to a certain extent, in the media, but not in the political sphere; and neither does the political sphere, in terms of policy-making, seem to be affected by such debates where they do occur.

Gender and welfare issues in public debate

Several of the most conspicuous social problems concerning gender and welfare revolve around female migration. The trend explained above – a rapidly developing

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231 Matsaganis et al. 2003, 640.
232 Matsaganis et al. 2003, 642. The female unemployment rate in Greece is nearly twice as high as the male unemployment rate, and much higher than the EU average (16.3 percent, compared to an EU average of 9.9 percent). See L. Maratou-Alipranti and R. Fakiolas, ‘The lonely path of migrant women in Greece’, 178–180.
gap in the care for children and the elderly – has largely been met by an increasingly sizeable domestic workforce comprised of immigrant women. Greece has a large population of economic immigrants in general: at 9–10 percent, Greece has the highest proportion of immigrants amongst southern European countries and, possibly, in the EU as well.234 In fact, immigration has become the only source of population increase in Greece. Furthermore, Greece has the highest rates of illegal migration in all of southern Europe, and the highest female migration rate in Europe. Males dominate migration from Middle Eastern and Muslim countries, and females outnumber males from central and eastern Europe, the Commonwealth, and the Philippines. In 1998, 60 percent of all migrants to Greece were female.235

The influx of female migrants leads to many important repercussions, depending on the employment path taken by the women once in Greece. Most of the female immigrants to Greece become involved either in the sex industry, or in domestic labour and/or care. The repercussions surrounding those who become involved in the sex industry are more obvious, and more publicly debated. Many of these women are victims of trafficking and are forced into the sex industry. Over 20,000 migrant women are trafficked into Greece each year. This number has risen steadily as result of Greek women becoming more educated and less likely to enter the sex industry themselves.236 These women are, of course, the most vulnerable and exploited immigrants in Greece: they are vulnerable to the force applied by traffickers and pimps, and they receive very little support from the Greek state (and, in particular, the Greek police, who often turn a blind eye to the exploitation and violence suffered by these women).237

The second main group of migrant female workers – domestic workers – also face significant problems in Greece. Their quality of life in Greece depends largely on their status as either documented or undocumented immigrants. Those undocumented are often forced to bear terrible conditions in the homes in which they work (extreme exploitation, even violence), for fear of deportation upon breaking their ‘contracts’ with their employers. Research conducted amongst migrant domestic workers reveals that there is a great deal of racial and ethnic discrimination in this job market as well, with colour and/or ethnicity largely determining whether they are employed as live-in help, as nannies or to care for elderly people, simply to do housework, or not at all in the home. These women are often well-educated, with tertiary education from their home countries. Quite significantly, many female migrant domestic workers (far more than in the case of immigrant men), leave their own families behind in their home countries, in order to be more free to work and be able to provide financially for their children back home: increasingly, the demand in Greece is for live-in domestic labour.238 This latter fact raises a question of relevance and importance beyond the Greek case as

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234 Tastsoglou and Hadjicostandi 2003, 193. See 194 of Tastsoglou and Hadjicostandi for a breakdown of numbers in terms of gender and nationality.
236 In 1991, the ratio of foreign sex trade workers to native ones was 3:7, by 1996, this figure had become 3:2.
237 Karakatsanis and Swarts 2003, 251–252.
238 Karakatsanis and Swarts 2003, 242–251, Cavounidis 2003, 228, 236.
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well: to what extent are patterns of female immigration for domestic labour (into southern Mediterranean areas especially) creating a new gap in domestic care in the domestic workers’ countries of origin? In other words, is a vicious cycle being established, whereby poor female workers seek domestic work in more affluent countries, thus creating a need for even less privileged female workers to fill the gap in domestic care left behind by the first wave of migrant workers? If this is the case, what can and should be done, and at what level (and in what geographical locale) should the effort begin? These are questions of increasing importance, which again apply beyond the Greek case and require examination through cross-national and cross-continental research covering at least two decades of female domestic work migration.

In general, conditions for migrant women have been improving gradually, as social awareness of the problem of human trafficking grows, and as the Greek state introduces legislation facilitating migrant women’s regularisation in Greece (two main legislative efforts were made in 1998 and in 2001).239 However, as one study points out:

The Greek legal system, which has been slow to introduce laws that would legalise undocumented migrants and, once adopted, has routinely misinterpreted and misapplied them, offers little protection to domestic workers and, in important ways, actually serves to heighten their insecurity and vulnerability. In the absence of protective measures, employers have what amounts to a nearly free hand in the treatment of their domestic help, as abuses of all kinds go largely unreported and unprosecuted.240

Finally, these migrant workers also face xenophobia in a Greek society struggling to come to terms with a loss of ethnic and religious homogeneity.

Amongst other gender-related issues high on the public agenda are, as mentioned above, the high rates of unemployment amongst Greek women (though more women are entering the workforce, rates of unemployment are still double that of men, and much higher than the EU average). And, related to this, there is much discussion of the need for an improved infrastructure for childcare, and improved social security/pension schemes offering some substantial degree of support to the elderly.241

In general, the weakness of the Greek welfare state is more publicly recognised as a burden to women in particular. Indeed, traditional conceptions of the woman’s role in the home have become institutionalised into the Greek social welfare state. However, as some scholars note, it is important to recognise similar trends in other European states as well, as part of an effort to promote common solutions to common problems in what is increasingly an interdependent Europe.242

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240 Karakatsanis and Swarts 2003, 247.
241 This was a major issue in the 2004 national elections, as the extremely low pensions received by Greeks, together with the heightened cost of living since Greece’s entry into the eurozone, have made life increasingly difficult for Greece’s senior citizens.
242 In Manuela Naldini’s words, welfare provision in general tends to be “gender-specific, promoting motherhood and aimed at reinforcing the traditional distribution of authority and power within the family, between genders and between generations, as well as strengthening solidarity between kin members” (cited by Karakatsanis and Swarts 2003, 245).
Concluding remarks

This brief analysis has illustrated a whole set of interrelated issues, which have collectively shaped and challenged the social welfare system in Greece, and which dominate the public agenda. Demographic factors such as low birth rates, the ageing of the population, intense urbanisation and increasing immigration (especially female immigration), intersect with certain socio-economic factors (e.g., greater education and liberalisation of women but persisting traditional expectations regarding women’s role in the home; and a heightened need for two incomes per family), to create unprecedented challenges to the national welfare system. These challenges include: continued disincentives for reproduction, insufficient pension provisions, tremendous gaps in care for the elderly and for children, still-high unemployment rates amongst Greek women, and acute socio-economic vulnerability of immigrant domestic workers.

The link between the underdeveloped Greek welfare state, the Greek traditional family structure (i.e., the role of women as informal social care providers) and the historic role of the Orthodox Church (i.e., as an official partner in the provision of social care) merits an in-depth examination of the Greek case. The comparison with the other European countries included in the study can yield more material critical to an understanding of the extent to which the Greek social state, and its relation to the family and the Church, is a typical example of the Southern European model of welfare provision or, rather, a unique version of this model.

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