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**Inequality and social inclusion from an indigenous community in the state  
of Oaxaca, Mexico**  
**Review of indicators and proposed of a spatial and cultural expression**

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## Abstract

This paper starts from the premise that social inclusion in indigenous communities does not have a political, but experiential, resulting management about how indigenous culture see the world as a humanized reality; expressed in its built environment and social dynamics. The importance of identifying and analyzing social phenomena from a current context-indigenous community responds to needs in multicultural contexts that help eliminate expressions of social inequality based on inclusive development models.

Work is accomplished using a qualitative methodology of descriptive perspective, using the ethnographic interview community leaders from an indigenous ethnic group and belonging to the community of study; in order to redefine and conceptualize the phenomenon, which will be interpreted from different authors to raise predictions of inequality and social inclusion that will affect future indigenous societies.

Specifically, two key stages of analysis are proposed: 1) To analyze inequality and social inclusion from a socio-political perspective. 2) To analyze the new social inclusion process derived from emerging phenomena. Fieldwork will be conducted: semi-structured interviews with community leaders and key members of indigenous citizenship.

By means of interpretive dialectic, it is intended to bring together the three perspectives to conclude in a general and specific way on the research topic. Through field work (in a subsequent research document), the researcher must compile the necessary information so that, once the fieldwork phase is finished, a descriptive and interpretative analysis of the data obtained is carried out, as well as the diagnosis of the survey of urban development records of the community.

*Keywords: Social inequality, Social inclusion, Ethnicity, Inclusive development, Quality of life, Social services, Wellness.*

## Background:

Inequality and social inclusion are key terms in contemporary Latin American societies. The issue of inequality took center stage in the policy agenda and research in Mexico, focusing on the nexus with poverty. <<inequality is a relational concept that can be addressed on several levels>> (Melamed & Samman, 2013). It affects the distribution between people and countries, is defined on two dimensions. Individual or vertical inequality, regardless of where they live or the social group to which they belong; horizontal inequality between groups by various factors. Both <<often mutually reinforcing and can create and maintain cycles of poverty for generations>> (Robert, 2014: 37)

For his part, Robert defines social inclusion as <<the process of empowering citizens and groups to participate in society and take advantage of opportunities; so that they may enjoy equal access to services and political, social and physical spaces>> (2014: 38)

In this line, Harris (UNESCO, 2016) states that << to understand the persistence of racial inequality when there is no state-sanctioned discrimination, we must unravel a series of everyday social practices that appear to be racially neutral, but have >> racially unequal consequences. Hence, the opportunity to recognize the peculiarities of Mexico as a multicultural country with 56 ethnic groups and promote development as a matter of equity and social justice that promotes progress from an inclusive platform.

Regarding as discussed above, the contemporary rural communities stand out for their rural territory; implying high levels of poverty, social exclusion processes marked and profound economic and social inequalities. For inclusive Mexico, you need << design and implement a policy that not only aim to overcome poverty but also contributes to achieving social inclusion of all citizens >> (Ziccardi, 2009: 238).

### I. Current status of the topic: New emerging phenomena

At present, the phenomenon of social inclusion undergoes progressive evolution to the consolidation of welfare states; << the new concept of citizenship guarantees and pursues full personal development of each citizen and social solidarity >> (López-Aranguren, 2007: 55). Hence, indigenous citizenship as the protagonist of the development of the welfare society.

Therefore, we consider three areas of social inequality to demonstrate levels of social inclusion and gain an understanding of the phenomenon: State field (production rights); economic sphere (production value); social field (social relations). They add new social rights: right to the city; access to the free culture and all those related to the recognition of the social and cultural diversity that incorporate collective rights. According to the literature review, focus on a conception based on citizenship and social inclusion, can extend the concept of social transformation <<to put into it to everyone >> (Subirats et al, 2010: 44).

### II. Current state social inequality: Identity and ethnicity in Mexico

Indigenous social inequality is sometimes not palpable by the way it is inserted into the political system of customs, where all people can have the same opportunities undeniable reality and, therefore, enjoy the same rights and obligations. As an example, the circulation of money has almost completely replaced the precolonial form of barter and today, communities are maintained with money from small production and shipments of migration, as << in Mexico I contemporary migration of indigenous peoples it has been one of the phenomena of greatest impact >> (Rios Morales, 2011: 90) in the expressions of community life.

Mexican social structure consists of various social groups that practice, each one a unique and different from other culture. The degree of cultural difference ranging from local issues to ways and customs of different life.

Mexico's territory is divided into 32 states; Oaxaca is recognized as one of them, being one of six highly marginal classified; indigenous regions have the highest rates of social inequality. According to literature review in 2010 of its 570 municipalities, 463 were reported high and very high marginalization within which 126 had the lowest human development index. (INEGI, 2011)

### III. Indigenous Government system: Decision Making

Indigenous communities in Oaxaca are distinguished by a political system of habits and customs; citizenship meets public and social charges, granting them the right to belong and live in the community.

Victor Toledo identifies three types of indigenous struggle for land << for control of the production process and eco-political character >> (Toledo, 1992: 42-45); You can not understand the indigenous movement as a homogeneous, which is displayed in various forms of organization and participation. While it is true that the problems are exacerbated in many indigenous communities, it would be impossible to generalize all those spaces where peasant-indigenous life is dependent on a centralized administrative structure that prevents them from seeking development strategies. (Rawls, 2012: 39) points out that << in a just society, the basic freedoms are taken for granted, and the rights secured by justice are not subject to political bargaining or the calculation of social interests>>.

### IV. Social System: Building social identities

For their ethnic identity, indigenous communities have the system of social organization *tequio* or community work; << regarded as cultural events are kept alive in the villages and indigenous communities where their cultural roots have not yet been dried and identity remains strong >> (Salinas and Fernandez, 2014). *Tequio* is defined as the contribution of everyone in the community, in kind or financial, or by participating in construction work for the development of local infrastructure. Hence the opportunity as a trigger to promote inclusive development in indigenous communities that << identity is the consciousness of being and is closely linked to recognition >> (Fanon, 2009).

From literature reviewed, the greatest challenge for indigenous communities to improve living standards without changing their identity; move towards a sustainable and inclusive model, preserving the principles of autonomy and community decision. For this, theories of inequality and social inclusion must be analyzed to show the current status of communities and meet their current and changing reality.

### V. Research Objectives

After a literature reviewing on the subject proposed:

#### **Hypothesis:**

Human development in indigenous communities in Mexico is promoted exogenously, never from their life project; causing the loss of cultural identity, social disintegration and inequality.



**Main Objective:**

Identify and analyze social phenomena related to inequality and social inclusion from a community context - current indigenous.

**Secondary objectives:**

- Identify new forms of social inequality that remain hidden or silenced by the indigenous citizenship.
- Evidence of indigenous social inclusion indicators to facilitate access to information and social actors move towards sustainable and inclusive development.

The structure of hypotheses, objectives and proposed analysis of reality can advance knowledge and understanding of inequality linked to social phenomena. In addition, an analysis of the indigenous community of Santa Catarina Lachatao located in the Sierra Juárez of Oaxaca, Mexico, which will reveal social indicators from its social, political and skyline will be made.

**VI. Conclusions: Degree of innovation**

This document will respond to a need to << complex social movements on one hand lead to fight for the vindication of universal human rights and on the other, to respect cultural peculiarities >> (Rios Morales, 2011: 13) indigenous groups fighting to eliminate various forms of inequality. Ribeiro (1977) argues that << indigenous societies today are testimony villages because people are people who give witness to what they have preserved the high civilizations that were in the past and that foreshadow what will be in the future. >>

The term "social inequality" is not new. However, an innovative approach which considers various concepts derived from that term is proposed, which justifies the element of innovation of this research, it explains the reality from indigenous communities through critical contribution of different positions and descriptions of reality from a community-indigenous vision that allows approximating the terms of identity and ethnicity from the perspective of belonging and experience.

Among the methodological innovations include the ability to make research visits and fieldwork from the indigenous community of study in Oaxaca, Mexico. In addition, performing a social and urban cartographic analysis on social inequality and accessibility in the indigenous community of study.

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## **Key factors of intervention by NGOs to break the poverty cycle: Life courses of the urban poor in the Philippines**

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## Abstract

This paper examines the key factors in NGOs' interventions aimed at breaking the poverty cycle by analyzing the life courses of the urban poor in informal settlement communities in the Philippines. The area has a high proportion of informal settlers who are among the poorest of the poor. Among these, children are the most vulnerable. Poverty has pushed them out of school and into employment in informal sectors, which usually places them in situations of abuse and exploitation. Poor families become trapped in poverty that can last for generations. People living in chronically impoverished conditions tend to form behavioral patterns that make it hard for them to escape from poverty. In urban informal settlements, where government services are limited, community-based groups and/or organizations facilitated by NGOs often intervene to address the cycle of poverty and change behavioral patterns. However, there are very few micro-studies about the key factors enabling the escape from poverty traps. A semi-structured interview was conducted with two informal settlers, who were assisted by a local NGO, to understand the process of breaking the poverty cycle from their perspective. The Trajectory Equifinality Model (Sato 2017) was adopted to describe their life courses with the aim of discovering the key factors relating to the NGO's intervention. It found out that (a) continuous support and rapport, (b) comprehensive intervention framework, (c) integrated approach to children, family, and communities, and (d) the transitional work opportunities not only led to their empowerment and enable the escape from poverty traps, but also transformed them to become influential individuals to help other community members. Understanding poverty from the perspectives of those who have already broken the poverty chain is crucial. It demonstrates the lessons to be learned by the international development community in tackling child poverty and breaking the poverty cycle.

Key words: cycle of poverty, intervention, NGO, life course, Philippines

## 1. Introduction

The poverty cycle is a phenomenon whereby poor families become trapped in poverty for generations due to limited or no access to critical resources such as education and financial services (Harper, Marcus & Moore, 2003). Parents' poverty pushes their children to leave school, leading to limited career and life choices that generally place them within an informal economy involving situations of abuse and exploitation. As Lewis (1959) concluded, intergenerational poverty is characterized by a constant struggle for survival involving socio-psychological traits such as lack of privacy, alcoholism, abuse, inability to plan for the future, resignation, and fatalism. Children under such conditions tend to miss opportunities to inherit the positive traits, behaviors, and skills (e.g., good study and health habits, motivation to learn, persistence, and self-control) that will allow them to succeed in society and break the poverty trap (Nippon Foundation Child Poverty Team 2016, Sayanagi 2017). Poverty in childhood is a root cause of poverty in adulthood. In order to break the generational cycle, poverty reduction must begin with children (UNICEF 2005, Harper et al. 2003).

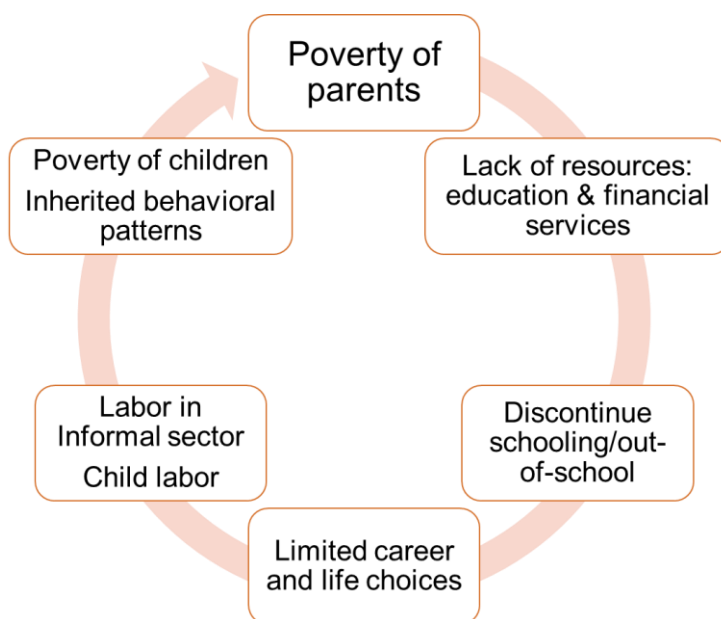


Figure 1: Poverty cycle by Inaba (2017), modified by the author

## 2. Research Objective

In the Philippines, it is extremely difficult for those born poor to extricate themselves from poverty.

There is no adequate health insurance system, unemployment support, social security, and protection from abuse (Tuason 2002). In the absence of effective governmental support, development aid projects by NGOs frequently aim to improve the well-being of the poor. So, how can poor urban children use assistance from NGOs to break the poverty cycle, and what are the key invention factors in achieving this? Efforts to answer these questions, especially from perspectives of the poor themselves, are so far minimal (ADB 2009, Sayanagi 2017). As Gopal & Malek (2015) argue, understanding poverty from the perspective of those who have already broken the poverty chain is crucial for all stakeholders. This paper therefore aims to examine the key factors in NGOs' interventions by analyzing the life course of the urban poor in informal settlement communities in the Philippines. It seeks to demonstrate the lessons to be learned by the international development community in tackling child poverty and breaking the poverty cycle.

### **3. Slum Children in the Philippines**

The Housing and Urban Development Coordinating Council (HUDCC) of the Philippines defines slum as buildings or areas that are deteriorated, hazardous, unsanitary or lacking in standard conveniences. They have also been defined as the squalid, crowded or unsanitary conditions under which people live, irrespective of the physical state of the building or area (UN-Habitat 2003). According to these definitions, slum dwellers are identified as the urban poor: individuals or families residing in urban areas whose income or combined household income fall below the poverty threshold. In 2009, around 1.4 million children in the Philippines were living in such informal settlements areas (Reyes, Tabuga, Asis, & Mondez 2014).

Cebu Province is one of the most commercially developed provinces in the Philippines, with economic growth that attracts many people from different parts of the country seeking employment. With a population of 4,167,353 (2010 census), Cebu is the fifth-most populous of the country's 80 provinces. However, the rate of people living in slums (also known as "squatters" or "informal settlers") is high. National government agencies estimate the number of people in Cebu City living in the slums at 35% (TDH Netherland 2013). Many of these slum dwellers settle in the province's three highly urbanized cities: Cebu City, Mandaue City, and Lapu-Lapu City. Families live in extreme poverty, with insufficient money to feed all the children, let alone send them to school. Most of these urban poor live in danger zones or are informal settlers on both government- and privately-owned land. Many families survive packed into small (6–10 m<sup>2</sup>) shanties. These informal settlements do not have access to basic services like water, sanitation, electricity, and drainage. The areas themselves are under constant threat of fire due to the illegal tapping of electricity, as well as flooding (TDH Netherlands 2013).

#### **4. Bidlisiw Foundation Intervention**

In the absence of a comprehensive, effective government program for urban informal settlers in the Philippines, community-based groups or NGOs often intervene to address risks and social problems to which children in informal settlements are vulnerable, such as violence, exploitation, school dropouts, and drug issues. Established in 1989, the Bidlisiw Foundation Inc. is a local NGO operating in the three highly urbanized cities of the province namely Cebu City, Mandaue City and Lapu-Lapu City. With experience as a social welfare and development agency, it is licensed and accredited by the Department of Social Welfare and Development (DSWD), the Philippine Council for NGO Certification (PCNC), and the Securities and Exchange Commission. Its development work focuses on helping urban poor families, particularly informal settlers in the cities of Cebu, Mandaue, and Talisay. Trained and committed staff and workers have implemented various programs/projects on health and nutrition, education, vocational training and livelihood. The target group is children and their families in need of special protection, including children involved in prostitution and their families, children in contact with the law and their families, child labor cases and their families, and other abused and exploited children (Bidlisiw Foundation 2017). Acting under their analytic framework (“Child and family: healing, recovery and re-integration framework”), they provide multilayered programs for children, families and communities. These programs consist of psychoeducation and capacity building, education support and economic opportunities for children and families. At the community level, the Bidlisiw Foundation creates child protection structures and mechanism by establishing community watch groups, peer support groups, and strengthening special bodies as mandated in the Philippines laws to protect children (e.g. Republic Act No.7610, 9344, 10364) (Bidlisiw Foundation 2017).

#### **5. Method**

A semi-structured interview was conducted with two informal settlers who received assistance from the Bidlisiw Foundation. Interviewee B is a 32-year-old male and interviewee J is a 28-year-old female. Both were living in Metro Cebu, Philippines in 2017 (Table1). Observation of the project activities took place throughout the fieldwork and was recorded in the fieldwork notes. The Foundation provided additional data.



Interviewee	Sex	Age	Residence	Size of family	Marital status	Interview date	Interview location
B	Male	32	Barangay Subangdaku Mandaue City, Cebu	7	Single	16:30–17:50 19/Sep/2017	Bidlisiw Foundation office in Mandaue City
J	Female	28	Barangay Tipolo, Mandaue City, Cebu	10	Married with child	18:00–19:00 19/Sep/2017	

Table 1. Profile of interviewees B and J

The Trajectory Equifinality Method (TEM) is a methodology for describing human life within an irreversible timeframe ( Arakawa, Yasuda & Sato 2012, Sato 2017, Sato, Yasuda, Kanzaki, & Valsiner 2014, Yasuda & Sato et al. 2012). It was applied in this instance to understand the life courses and key elements that helped interviewees to change their behavior, decisions and actions, allowing them to escape from poverty. The interview data was transcribed, coded, and analyzed, with a focus on the following conceptual aspects: a Equifinality Point (EFP)—a point on which researchers focus to study; a Polarized Equifinality Point (P-EFP)—the imaginary opposite to the EFP; an Obligatory Passage Point (OPP)—a state through which one must inevitably pass to reach a particular place; a Bifurcation Point (BFP)—a critical junction when moving in a certain direction; a Social Direction (SD)—relative socio-cultural impetus via which to discourage individuals from reaching EFP; and Social Guidance (SG)—relative impetus via which to encourage individuals to reach EFP (Table 2). The experiences of B and J, the time frame, events and circumstances described herein are all authentic. However, in the interest of confidentiality and protecting the integrity and rights of B and J and other persons involved, real names have not been used.

## 6. Findings

Figure 2 shows a TEM diagram depicting the life courses of B and J for the following three timeframes: life in the poverty trap prior to the Bidlisiw Foundation’s intervention (Phase I); during the intervention, including the transformation of their behavior, decisions and actions (Phase II); breaking the poverty trap (Phase III).

### 6.1. Phase I: Life in the poverty trap

Both B and J were born in informal settlement areas in Mandaue City. They grew up in homes filled with violence, neglect, and severe family dysfunction. During their childhoods, B's mother passed away, and J's mother abandoned her family due to drug addiction. B's father told him that he would never support his schooling, and J's father lost contact for many years, leaving her to be raised by her grandmother. Both grew up in a big family (7–10 members). B graduated from high school but discontinued his studies, against his will (SD1). He started to work in the informal economy as a vendor, but the pay was minimal. J dropped out of high school as she did not understand the value of education (SD1). She started working in the informal sector in roles such as a laundress and a small shop worker (OPP1). To avoid staying in crowded houses with abusive families, they began spending time with peers who had also dropped out of school and were engaged in underage prostitution (OPP2). B recalled that he did not give much thought to his future during this time.

## 6.2. Phase II: Intervention and transformation

B was approached by the Bidlisiw Foundation while wandering around with peers at night. J knew about the Bidlisiw Foundation through her cousin, who had previously attended one of their seminars (BFP1 and SG1). After making initial contact on the street, the Bidlisiw Foundation visited B's house to invite him for training and activities. B was surprised by their visit and joined a session about HIV/STD (BFP2), which convinced him of the foundation's authenticity and good intentions (SG1). Similarly, J participated in vocational training (OPP2) and was hired as an assistant chef for a food catering service run by the foundation (BFP3). B also became a Peer Educator, taking part in a program aimed at identifying children at risk at night. His role was to approach at-risk children and urge them to stop or veer away from vices and to encourage. He encouraged these children to transform their lives by participating in the Bidlisiw Foundation's programs (BFP3).

## 6.3. Phase III: Breaking the poverty trap

With the constant encouragement of Bidlisiw Foundation staff, and empowered by his role as a Peer Educator, B enrolled in university to study to become a social worker (BFP4). A staff of the foundation, who was a former at-risk child and beneficiary of the foundation, supported him to pay his tuition fee. However, continuing his studies was still difficult, as he often lacked money for food. The foundation staff, his sisters and friends at the school supported him with his daily needs, including school supplies, fees, and snacks. The foundation also provided B with occasional opportunities to work at the office, which helped him financially (BFP3). The pressure was at its

greatest when writing his graduation thesis. Without the proper environment or means, such as a computer or money for printing, he was on the verge of giving up. He thought of quitting school and taking any available job (SD2). However, the Bidlisiw Foundation staff and his friends at the college kept on encouraging him. They reminded him that he would get a better job once he had a degree, and allowed him to use the office computers and printer when necessary. B finally graduated from the college and was recently hired by the DSWD as a social worker (EFP1).

There was also a time when J was about to relapse. Once, under pressure from her peers in the community, she attempted to return to the street sex trade (SD2). However, she successfully resisted, going on to become a catering service chef at the age of 25, with no intention to go back to the streets. Both B and J cited hardship as a driving force in their escape from poverty (SG2). J said, “I thought about my parents. I did not want to become like them.” B said, “It was difficult experience, which motivated me.” J is proud to provide financial support for her grandmother who raised her. She uses her income to rent a house for her family, and is happy that people in the community look up to her and ask her for advice. Both B and J attempt to motivate their friends, family, relatives and children in the community to go back to school and to attend Bidlisiw Foundation programs. Two school dropouts referred by J have since joined training sessions conducted by the Bidlisiw Foundation. One of these has received financial assistance from the foundation and is currently enrolled at college (EFP2).

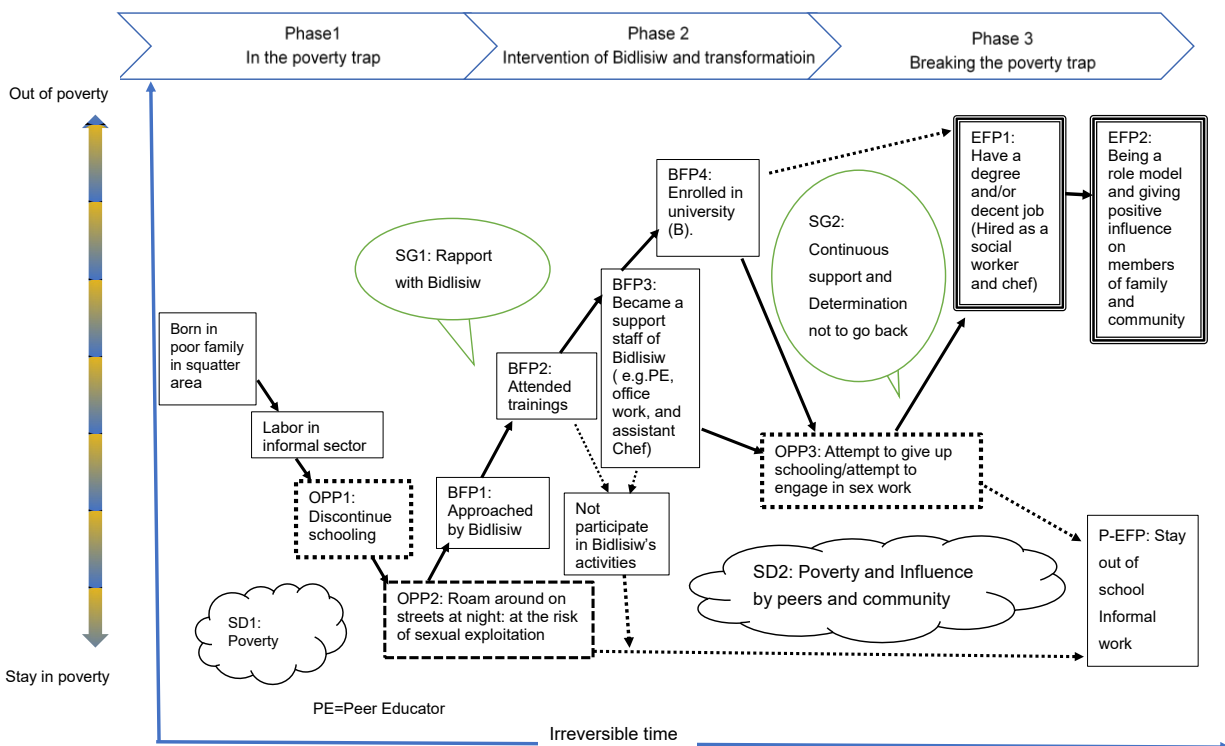


Figure 2. TEM of life courses of B and J

TEM concept	Events in the life course
Equifinality Point (EFP)	EFP1: Have a decent job (graduated from university and became social worker; hired as a chef) EFP2: Being a role model and having a positive influence on family members and the community
Polarized Equifinality Point (P-EFP)	P-EFP: Staying out of school and engaging in informal labor
Obligatory Passage Point (OPP)	OPP1: Discontinue schooling OPP2: Roaming around the streets at night, at risk of sexual exploitation OPP3: Attempt to give up schooling/attempt to engage in sex work
Bifurcation Point (BFP)	BFP1: Approached by Bidlisiw Foundation Inc. BFP2: Attended training sessions BFP3: Joined Bidlisiw's activities as support staff BFP4: Enrolled in university
Social Direction (SD)	SD1: Poverty of family SD2: Influenced by peers and community members
Social Guidance (SG)	SG1: Rapport with Bidlisiw staff SG2: Continuous support from Bidlisiw staff and new friends

Table 2. TEM concept and B and J's life trajectory events

## 7. Discussion: Key intervention factors helping the urban poor to break the poverty cycle

This section discusses the key intervention factors that contributed to B and J breaking the poverty cycle, based on the analysis of their life courses. These key factors are as follows: (a) continuous support and rapport; (b) comprehensive intervention framework; (c) integrated approach to children, family, and communities; and (d) the transitional work opportunities.

### 7.1. Continuous support and rapport

The life trajectories of B and J showed that the Bidlisiw Foundation's commitment to help was not transient, and that the relationship with the beneficiaries was continuous and lasting. When B and J were losing direction and experiencing doubt (OPP3), the encouragement and advice of Bidlisiw Foundation staff played a vital role in setting them back on track. Following the initial intervention, the staff was able to build a rapport with the young people and act as mentors. This relationship based on trust became a type of social capital and played a significant role in bringing about positive behavioral change.

### 7.2. Comprehensive intervention framework

The modality of interventions was comprehensive, including health, education, and career support. As in figure 3, the program was divided into three timeframes: guided self-assessment (Phase I); career and life planning (Phase II); and access to career and life opportunities (Phase III). The aim was to ensure that the children, family, and community were gradually able to extricate themselves from the poverty trap. To this end, it is important that assistance includes not only monetary and in-kind support but also emotional and mental care. Equally, the target should not be limited to children, and should seek to include families and communities, as the mutual influence of which is evident.

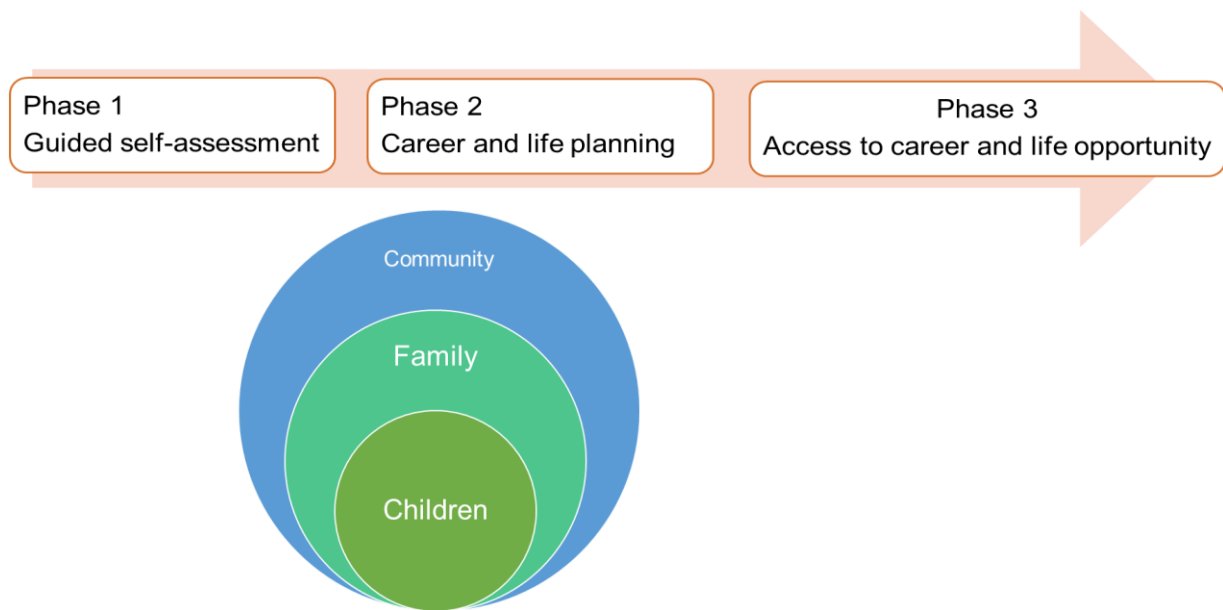


Figure 3. Comprehensive intervention framework by the Bidlisiw Foundation (made by author based on data from the Bidlisiw Foundation, 2015)

#### 7.4. Transitional work

B worked as a Peer Educator and office assistant, and J worked as an assistant chef within the Bidlisiw Foundation. These transitional work opportunities enabled their social integration in a manner distinct from their previous experiences. These types of social enterprise that focus on improving prospects for those furthest from the labor market should be a focus of future support.

#### 7.5. Transformation from “helped” to “helper”: the experience of hardship as an asset

The interview revealed that both B and J not only changed their behavior but also became role models for other community members. This positive impact was further enabled by their respective transformations from “helped” to “helper.”

## 8. Conclusion

Despite the accepted narrative that it is difficult for those born poor to extricate themselves from poverty in the Philippines, the life courses of B and J demonstrate that under certain circumstances it is possible. Understanding poverty from the perspectives of those who have already broken the poverty chain is crucial. It demonstrates the lessons to be learned by the international development community in tackling child poverty and breaking the poverty cycle. Analysis of their trajectories demonstrated the key factors in the Bidlisiw Foundation's development intervention that enable the urban poor to break the poverty cycle. Such interventions should be comprehensive and continuous, including financial support, capacity building, and emotional/psychological support. They should also extend to children, the family, and the community. It is vital that rapport and long-term relationships are established between NGO officers and beneficiaries, allowing NGO staff to become mentors and life coaches. The interaction with NGO staff is a process by which new social capital is created, which is grounded in a relationship based on trust. It brings beneficiaries new perspectives and experiences by which to extricate themselves from poverty and change their behavioral patterns. Providing work opportunities such as assistant chef, Peer Educator or office assistant empowers young people, allowing them to actively plan their career and partake in their transition from "helped" to "helper." Motivated by personal experience and the desire to improve the lifestyles of children and peers around them, their capacity to overcome hardship and poverty becomes their greatest asset.

This research was based on interviews with two individuals. Future research should focus on a larger number of interviewees. Also, research into those who failed to break the poverty trap, despite NGO intervention, may be valuable in understanding the key factors for successfully achieving the same.

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# **Monitoring Poverty with Technology: Designing Social Decisions with Language Pedagogy**

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## **Abstract:**

Fundamentals of content and language integrated learning (CLIL) in a technology-based poverty measurement context provide a unique perspective to rediscover language teaching and learning. This article provides a holistic overview of how different technological applications such as Google Maps, Google Earth, Concept Mapping, and other worldwide entrepreneurial, philanthropic and social initiatives makes a difference; how crowdsourcing of spatial and location-specific data could help identify poverty, understand local socio-economic and lifestyle-oriented problems, and trigger a discussion about community decision-making. Such use of technology could potentially help make a convincing case for the type of poverty; including exact issues in the locations, proximity to resource hubs, lack of basic health and other facilities, employment and so on. The primary focus in this article is to bring to focus how content language integrated learning (CLIL) combines content areas such as mechanism and technology for poverty identification and analysis on the way to learning the target language. Use of such technological applications in a foreign language-learning course for policy decision-making and community engagement is rather unique, and has hardly been investigated in a foreign or second language classroom. But such applications help students learn a specific content area; help learn how to document data systematically, and how to design and present policy documents for a social cause. Such language teaching initiatives in this technology-driven context of poverty identification and measurement could potentially cover all 4-skills (reading, listening, speaking, and writing).

**Keywords:** Maps, language, education, poverty, information design, social networks

## 1. Introduction

Monitoring poverty with technology has a unique connection with *Content and Language Integrated Learning* (CLIL). Based on the fundamentals of CLIL, the interfaces (websites & software) that facilitates identification and measurement of poverty, lifestyle and health issues for general population in mainly developing nations (could be developed nations as well) leading to social decision-making, provides an unique opportunity to integrate both content and language learning in a unique social context. Further, this area of study (like many such application contexts) allows language instructors the opportunity to reflect on and understand the difference between CBI and CLIL. Many linguists argue that CLIL and CBI represent very different concepts, where CLIL represents the intersection between content and language from the content perspective (i.e., CLIL happens in content classes), while CBI is an attempt at responding to the content needs of learners in language classes (Dalton-Puffer et al., 2014). For poverty monitoring, identification, measurement and analysis and for social purposes, understanding the social theories and technologies that helps with poverty measurement are the content areas, whereas document production in English as the target language emanating from the contextual use of the websites and software for poverty monitoring helps with content language integrated learning. This pedagogical difference is important for language instructors to realize, and this content area could prove to be an interesting application context for language instructors to use in EFL/ESL language classrooms, as it offers numerous opportunities for students to engage in both personal and social capacity. Based on the fundamentals of CLIL, this paper focused exclusively on addressing specialized topics such as poverty monitoring and disaster management towards learning a foreign language. This paper argues that poverty monitoring and related social perspectives could be an interesting application towards designing language pedagogy, and gets students to contribute towards social decision-making, including identifying areas where policy changes and immediate responses are required.

## 2. Measuring Poverty with Technology

There is rising research on where to concentrate poverty-alleviation programs based on limited data. Statisticians situate their data collection and analysis approach mainly on surveys and economists make their policy decisions based on poverty prediction models. But new methods have emerged on how to measure poverty, consumption expenditure, and asset wealth from high-resolution satellite imagery (Ralston, 2016). Such data complements the existing survey based data, and fills the gap in an attempt to identify pockets of poverty with systematic and objective based measures. Machine learning algorithms, manual digitization to identify features, and textural and spectral measurements are complementary techniques that are used in combination with linear and non-linear estimation models.

*Google Maps* and *Google Earth* are extensively used for poverty identification (including health environments) in both developing and developed world (Rundle et al., 2011). The researchers combined machine learning – the science of designing computer algorithms that learn from data and satellite imagery – to extract information about poverty from high-resolution satellite imagery (Horton, 2016).

### 2.1. Few Interesting Practices to Fund Poverty Alleviation

*GiveDirectly* ([www.givedirectly.org](http://www.givedirectly.org)) is a nonprofit that does something kind of radical. It identifies some of the poorest households in rural Kenya and Uganda and gives them

money via a mobile phone transfer—with no strings attached. The recipients are free to use the money to pursue their own goals.

*Fundación Paraguaya* is a nonprofit social enterprise in Paraguay that is focused on using microfinance, education, and more innovative methods (including Poverty Stoplight) to eliminate poverty in the country. The *Poverty Stoplight* operates on the notion that, in order to truly make a difference in eliminating poverty, one has to first understand it. *Poverty Stoplight* helps understand the ways in which each family is poor, define what it means for these individuals or families to be not poor, quantify all of that, qualify it, and then come up with an exit strategy. After completing the 20-minute, 50-question pictorial survey on a touch-screen device (developed by Hewlett-Packard), clients receive a one-page report that summarizes in ‘heat map’ fashion the areas in which the family is extremely poor (red), poor (yellow) and not poor (green)

(<https://medium.com/@Accion/putting-poverty-on-the-map-cc4954bd7311>).

Another interesting application for practice in a language classroom that could lead to extensive technical documentation is the use of *Mapbox* that helps design a custom map with cartogram

([https://www.mapbox.com/?gclid=CjwKCAiAt8TUBRAKEiwAOI9pAFwPH1kJWJb7yF7lggNPj5AU82Gk\\_JyMDDNjkBfGI-CWY81JHSzO3hoCyh0QAvD\\_BwE](https://www.mapbox.com/?gclid=CjwKCAiAt8TUBRAKEiwAOI9pAFwPH1kJWJb7yF7lggNPj5AU82Gk_JyMDDNjkBfGI-CWY81JHSzO3hoCyh0QAvD_BwE)).

There is many other software and websites that could help language students learn both content and language production and reception in an EFL/ESL classroom. It could be an interesting research area for language teachers to explore such content and application contexts.

### 3. Application in a Language Classroom

Google Maps applications such as *My Maps* and *Google Earth* satellite imagery could be effectively used in tandem in a language classroom to identify pockets of poverty and author descriptions of such areas in a language-teaching classroom.

The idea would be for students to work in groups, select a city of choice (probably in the developing world) or for locations that students are familiar with, search for online information, and read about its neighborhoods and pockets of poverty from publicly available data, and then use *Google My Maps* (or <https://www.scribblemaps.com/>) to identify and describe such areas with map-based text support. Students will identify types of buildings, roads, types of markets, shopping malls, cars being parked etc. in selected and pre -defined neighborhoods to form an idea about the type of locality. Day and nighttime satellite imagery from *Google Earth* about electrification could also be used (if available) to substantiate and increase the reliability of data pertaining to poverty. As a more extensive activity, student would describe each pinpointed area or building/bridge/park etc., in text and show how the pockets of poverty are connected to economically richer neighborhoods in the city, such as office areas (types of offices), water sources, markets (e.g., proximity, driving and walking directions, public transportation availability etc. Students would then take this connected/networked geographical map as drawn with *My Maps*; to author a concept map (with software such as *IHMC Concept Mapping* software, *Mind Maps* etc.) showing how the pockets of poverty are connected to more developed areas in the city. Concept maps provide a very crucial learning experience and helps extensively with planning and evaluation (Kane and Trochim, 2007).

Finally, this activity could be further enriched with a superior analysis by representing the concept map connections in social network analysis to show bridge, density, distance, centrality, structural holes, and strength of the network, using *Gephi* and *Social Network*

*Visualizer* software. Social networking analysis is a powerful strategy for information sciences, and could be effectively used in this context with sufficient improvisation (Otte and Rousseau, 2002). The unique feature of this analysis would be that the relations are not defined for individuals, as is typically the case for social network analysis, but between separate neighborhoods, or defining impoverished zones and how they are related to or connected to other areas in the same city.

Throughout the entire range of the above activities, students would be ideally involved with writing, cartography, design, and technical presentations; and towards a more holistic approach to poverty monitoring with language learning. Such language learning initiatives should technically have policy and decision-making implications towards effective governance. This limited context of *crowdsourcing* to generate customized maps could also be tried in a language classroom for disaster zones (such as from flood, wildfire, earthquake, cyclone etc.) with the ultimate purpose of channelizing aid to areas where it is needed the most. Crowdsourcing is an important element of participatory governance (Certoma et al., 2015) and could be effectively used in this context.

Facebook's new "disaster maps," planned for release post-2017, uses aggregated, anonymized *Facebook* data in disaster areas to deliver crucial information to aid organizations during and after crises. Such information and framework could be combined in the design of *My Maps* or *Scribblemaps* and integrated successfully in the language classroom.

Further, *Google street view* (or <https://www.instantstreetview.com/>) and *Google Maps APIs*, in general, could be used in the language classroom, for more in-depth descriptions of areas already identified with Google maps. In the language-learning classroom, activities leading to the textual description of detailed poverty maps, and reading social networks such as *Facebook* and *CNN iReporter* about poverty and disaster could be an ideal way to learn the target language and also understand how to contribute towards poverty identification and reporting. Another great language learning exercise could revolve around using *Whatsapp* closed group to create mock drills about poverty description and disasters and immediate relief measures. *Whatsapp* has recently announced the *Live Location* feature, and that could be used to map poverty locations as part of census data. As part of a field study in language learning class, students could travel around their own city and identify poverty areas or areas with crime, low employment, child labor etc., interview residents and send instant messages to classmates or group partners about poverty and problem types. Messages sent through *Whatsapp* could be pegged to locations tracked using the *Live Location* feature.

Research has suggested using both participatory and survey-based approaches to poverty monitoring and analysis (Appleton and Booth, 2001), and the above-mentioned technology provides a perfect gateway to use such approaches complementarily in a language classroom to teach content, language and technology, all at the same time.

#### **4. Future Potential & Conclusion**

Future research should look into unidentified areas of language education such as making *Facebook* groups, writing *blogs*, using *Twitter*, *Instagram* etc., for poverty and disaster monitoring in a real-time context, that serves not only the purpose of language learning in a more practical context, but serves a social purpose. Maps and information available based on geographical data (e.g., satellite imagery) could be used to further study existing data on how social networks vary between people of different ethnic groups and financial status; examine whether people with mixed social networks are less likely to be living in poverty; and look at regional differences in the relationship between poverty, ethnicity

and social networks. Representing existing data in social networks using maps could be an exciting text-cartographic pedagogical application previously unexplored in a language-teaching context.

We need for students to have a rich experience with different combinations of text-graphics-video modality including hands-on engagement, and language acquisition is expected to happen as a result. Technical communication could be an important focus for such courses with report writing, feasibility and recommendation studies, email communication, writing commentaries, chats, text captions, interviewing etc. Language learning activities such as technical oral presentations; listening to, watching and self-production of poverty-related programs with English subtitling based on *YouTube*; reading and knowledge creation from other poverty and technology-related websites etc., could be used and explored in combination with various Google-based and other technology contexts as reflection assignments. With such use of technology and documentation, the aim is to empower students in revitalization efforts in the community, and make them an integral part of the social decision-making process.

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# One for all, all for one: The generalized trust and the welfare state Norway

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## Abstract

This paper presents the preliminary findings of a study on the dynamics and challenges of the welfare state Norway. The welfare programs are sustainable as long as the protection of the vulnerable are secured. Norway scores high both in terms of protecting the vulnerable and maintaining equality. Norway has the reputation of sustained generous welfare programs, which is attributed to its policies of economic growth, redistribution policy, and full employment. The positive impacts of the growth with equity is recognized, the findings of this study take us beyond. A high level of generalized trust, expressed both in individual behavior and in relations between individuals and the society, creating collective conscience (*samvittighet*). Such a conscience promotes cooperation in achieving common goals, including the protection of the weak groups in the society. This feeling of togetherness provides Norwegians with the feeling of solidarity (*felleskap*), and defines individuals' rights and obligations to the state. Such reciprocity in the state-citizens relations further explains why Norway has a good record in work force participation. The state guarantees that exit from labour market not followed by loss of income, that universal welfare benefits reach the population. The majority of Norwegians believe that their individual wellbeing depends on others welfare, and they tend to rely on the state's role in creating and maintaining universal welfare programs with high levels of taxation.

**Key words: Decommodification; Familialization; Solidarity; Trust; Welfare state**

## Introduction

There is a growing awareness on the sustainability of the welfare State. Critics claim that welfare states faces free riding and motivation crisis, the system does not reflect the differentiated life situations and individual needs. Furthermore, the system allows strong state control in everyday life (Bawer, B. 2001). Despite such critique, the demand for social protection is growing and people express their continued reliance on the state. Nordic countries ranks consistently high across every welfare index. The social system relies on a sense of trust. The relation between the sustainability of welfare programs and trust is assumed.

Trust, sociological theories claim, softens the atomistic individualism of modern market society. It is argued, in modern societies, with its complex division of labor, there is a need to economize on trust in persons and confide instead in institutions (Misztal, B, 1996).

This paper provides an empirical evidence of importance of trust in economic activities and for the sustenance of welfare programs in Norway. It adresses two questions: How trust is created and maintained? What kind of social trust enhance individual economic transactions and governmental performance?

The strong institutional basis of trust is recognized. However, the analysis takes us beyond and directs our attention to trust in interpersonal network relations. Drawing together observations and threads of a number of studies, it arrives at somewhat integrated idea of individuals' interactions with their ongoing social relations that create trust. Causal sequences are involved in the process of social interaction: repeated interactions within and between networks ensure trust in social life. Furthermore, social networks and obligations inherent in those are mainly responsible for creation of collective conscience (*samvittighet*), which facilitates cooperation in achieving common goals. The causal sequences in the pattern of interaction are elaborated in the following.

The section to come gives an account of trust, including creation of trust and emergence of generalized trust in the welfare state. Section 3 gives an historical account of the emergence of the Norwegian welfare state and institution based trust. Section 4 relates the assumption of new economic sociology, that repeated interactions within networks generate trust with the dominant generalized trust in Norway. Section 5 discusses how the free rider problem as resolved in the Norwegian society. It concludes with the argument that trust develops in the mutually formative interplay of public institutions and individuals. Institutions and networks are not alternatives, those, rather complement one another. The paper concludes with the claim, the sustainability of the welfare state depends on such complementing role.

### **Economy, Society, and Trust**

Social trust- the belief that most people can be trusted-is a precondition for the transactions, be that between two individual, known to one another or not, or between the state and individuals. When trust is high the probability of cooperation is also high. When a person pays tax, he/she has the confidence that the money will be used for him/her, or for a common interest and others. Those who are capable/taxable, contribute to the common pool of resources. People in Norway experience consensus and solidarity brought about by their equality in terms of access to economic and social resources.

Trust- a social resource, is an outcome of repeated interactions among individuals. Though an old phenomenon, interest in trust in the academia is a recent one, owing to a growing consciousness on new social bases of economic transactions, cooperation and solidarity.

In a social situation where information is absent, or not perfect, the issue of trust arises. Where individuals are in ongoing interactions, transactions take place spontaneously. People refrain from deceit or dishonest actions owing to their awareness that such an act may run against their interests. An individual will hardly enter into economic transaction with another whom he or she can't trust (Platteau).

Trust facilitates not only transactions, but also cooperation. Individuals support one another because they believe that they belong to a community based on mutual trust (Fukuyama, F 1995). People in small communities rely on strong ties and have an incentive to refrain from malfeasance.<sup>1</sup> People live in close proximity, they are well informed about each other's acts and positions, common knowledge prevails, rule breaking behavior is easily monitored. In such situations, people are more likely to cooperate. Cooperation implies abstaining from fraudulent acts. It follows from this that trust creation is a process of social interaction. As mentioned earlier, in market societies, trust softens the atomistic individualism.<sup>2</sup>

Trust got exclusive attention in economic sociology. With an embedded notion of the economy, Karl Polanyi claimed that the utility maximizing *homo economicus* was a product of the market economy and its transactional mode of exchange, which replaced two earlier modes of transactions, reciprocity and redistribution.<sup>3</sup> Within the following debate on economy-society relations, social changes are perceived as changes in modes of trust; trust in kinship, community etc., replaced by trust in institutions (Zucker).

We learn from anthropological studies, earlier small communities were characterized by reciprocal transactional mode. Individuals were dependent on supports of their kin and others with whom they had face-to-face interactions. Transactions took place in tightly knit networks of interpersonal relations (Malinowski). Practices of mutual obligations, transactions of inalienable nature of things (Mauss) perpetuated interdependence and particularistic trust.

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<sup>1</sup> The strength of strong ties does not conflict Granovetter's claim of the Strength of Weak Ties. For Granovetter weak ties are useful in situations where individuals are mainly getting information, but don't have to worry very much about trust. Granovetter 1998, in Interview with Rahman.

<sup>2</sup> Mizstzal, B.

<sup>3</sup> Section 3 presents Polanyi's transactional modes relating to the emergence of the welfare state.



With the rise of agriculture and the concomitant increases in production, population density and urbanization accompanied it, cooperation could no longer be based on particularistic trust alone. The new transactional modes, redistribution and exchange, followed by a new form of interaction and integration/solidarity (Durkheim). The new form of interaction generated new generalized trust.

The norms of impersonal market exchange emanate trust in market societies.<sup>4</sup> As we learn from Marx, Polanyi, Simmel, commodity exchange in market economies involves a process of commodification (of labour, land, money etc) and elimination of forces obstructing market forces (Polanyi 1944). The commodification resulted in marginalization of the vulnerable and alienation of labor. The welfare state emerged to redress the harm caused by commodification and to protect the vulnerable against the risks of the market (Polanyi 1944).<sup>5</sup> The emergence of the welfare state involved a return to redistributive mode of transaction (Polanyi) and increased generalized trust (Zucker). Thus, the process of social change can be looked upon as “the transformation of modes of trust”.<sup>6</sup> Outlining three kinds of trust Zucker analysed the transformation that began around the end of the nineteenth century. One major dimension of the transformation is that welfare societies came to be characterised by institution-based generalised trust, which is an absolute requirement for the state to function, as well as for sustained cooperation and social solidarity.

An important point is that if people have an abiding respect for laws enacted by the state, the problem of generalized trust could be solved. This pushes trust one step further. The obvious question is, as Platteau asks, ““how people tend to recognize the authority of modern law-enforcing authorities when they have traditionally used to obey local authority and to abide by norms of reciprocity of a community”? One plausible answer may be, as Lipton thinks, it must be understood as a process called “transition of trust”, or what Zucker called the transformation of modes of trust. The process involved institutionalization of formal relations and exchange transactional mode replacing interpersonal reciprocal transactional mode and particularistic trust. As an evidence, the 18<sup>th</sup> century development experience of England may be referred (Polanyi, 1977; and Wrigley, 1988).

The importance of trust in modern societies is emphasized exclusively in new economic sociology. A pioneer in the field, Granovetter, in his critique to the utilitarian atomistic perception of the economic actors, claims that individuals do not behave or decide

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<sup>4</sup> See for instance Platteau 1993, Shipton 1988, Sen 1987, Odingo 1985, Atwood 1990, North 1977

<sup>5</sup> Section 3 elaborates this issue.

<sup>6</sup> Zucker 1986: 54.

as atoms outside a social context. Their attempts at purposive actions are instead embedded in concrete, ongoing systems of social relations, “transactions of all kinds are rife with the social connections” (Granovetter 1985: 487, 495). Social norms, values, rules, institutions or direct interactions of some kind must be posited to solve the coordination problems resulting from informational asymmetries. Fraud and deceit can be tamed only through the production of trust in economic life. In generating trust, the role of concrete ongoing personal relations and structures of networks is predominant. Granovetter claims that rational individuals are “less interested in general reputations than in whether a particular other may be expected to deal honestly with them- mainly a function of whether they or their own contacts have had satisfactory past dealings with the other”(Granovetter 1985). The identity and past relations of individual transactors would thus matter.

Granovetter’s claim that social relations and obligations inherent in them are mainly responsible for the production of trust, which in turn facilitates cooperation, has its evidence in market economies and welfare states (Sabel 1989; Zetlin 1989). This paper provides further evidence, the high level of trust in interpersonal relation in welfare state Norway.

A comment on trust in interpersonal relations is in its place here. The existence of a society, and its continuity, is conditioned by people’s ability to communicate their approval to other members, which shape social relations, and nature of social institutions. In Goffman’s view, people convey to others in the society, who they are, whom to trust, or not to trust, without any special attention and thought, is performed through a common recognition of one’s standing in terms of trustworthiness.<sup>7</sup> Consequently, trust in interpersonal relations plays a significant role in institutional function and in the maintenance of social order.

### **Institutionalization and the mode of trust in Norwegian welfare state**

Norway today is a highly prosperous society with high quality of life. Its score is high in terms of economic, social and human development index. Norway has the reputation of sustained generous welfare programs and maintaining social equality. The concept ‘equality’ is an outcome of institutionalization of Norwegian egalitarian values, which can be traced in its social formation, and can be observed in social practices. Various institutional arrangements and socio-economic policies were set in motion to pursue the egalitarian values. Its policies include child benefit, sickness allowance, old age pension, unemployment

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<sup>7</sup> Goffman 1963: 2.

allowance etc. Furthermore, young families are given subsidized loans for housing, students are given study loans and scholarship. Norway's achievement in this regard is outstanding, which is attributed to its redistributive policy of growth with equity. The Norwegian state gives a higher priority to its social democratic values of equality and solidarity through redistribution of growth outcomes than to just economic growth (Senghaas, D.1985; Mjøset, L. 1990;1996).<sup>8</sup> Norwegian social democratic policies guarantee income and means of subsistence independent of market forces. Therefore, Norway has a good record in work force participation (Senghaas, D.1985), despite exit from labour market is followed by no, or little loss of income (Esping-Anderson).

The social democratic ideology has guided post-war Norwegian economic and social policies upholding its egalitarian values. The strategy involved a process of what Polanyi called a double movement. First a transition to market economy (exchange mode of transaction) and then back to the state- market mix of redistribution, in which the state has the major redistributive role (Polanyi 1957).

The previous section described briefly Polanyi's three concepts explain three ways in which the economy is socially organized, and gets stability; reciprocity, redistribution and exchange, which have to be supported by a particular set of institutions. Support for reciprocity is a symmetric social structure by which Polanyi meant kinship structure, when he was talking about pre-capitalist, non-market societies. For redistribution, support is from a centralized political structure, support for exchange is the market. Mark Granovetter emphasized that we need to recognize that reciprocity is also a central principle of coordination in a welfare state. The norm of reciprocity and supporting network structures are quite central in modern societies as well (Granovetter 1999). Individuals' rights implies their obligations to the state and vice versa. Trust is a necessary accompaniment to state-citizen relations, in Norway for instance.

The fundamental problem is to understand the substantive character of market exchange, and what possible substitutes are there in the institutionalization of economic life, followed by reinstitution of reciprocity in the newly emerged of welfare states. The exchange

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<sup>8</sup> Senghaas explains "the development implications of forced growth processes depend on the socio-structural condition prevalent at the onset of economic growth. In conditions of only moderate inequality there is no automatic connection between growth and the lack or elimination of absolute poverty". The social democratic ideology reversed such a tendency. Norway, and "the Scandinavian social structure has helped to prevent the emergence of structural heterogeneity".

mode of transaction and the utility maximizing market principle complemented by commodification of land, labour and money. The market principles penetrated in all spheres of human life, thereby eroding social order, and human values.<sup>9</sup> Only God people trust, and everything else measured and valued in monetary terms. Commodification appeared to be a weakness of market societies because of its destabilizing effects. The market lost its credibility. Redistribution had to be reinvented in order to provide people with the necessary social protection and support. The welfare state emerged (Polanyi 1977), “the welfare state flowered at the very same moment that ‘Golden Age’ capitalism began to wilt (Esping-Andersen 1999). Many services, which were regarded as the family’s task, became the state’s responsibilities, and the citizens reciprocating through performing obligations to the state. Individual pay tax and the state provide individuals with services they require. The reciprocal mode includes work both as individual obligation and as right, and generates generalized trust. Figure 1 presents the substantive character of market exchange, and the substitutes in the welfare states.

<b>Transactional modes</b>			
	<b>Reciprocity</b>	<b>Redistribution</b>	<b>Exchange</b>
			<i>Decommodification</i>
<b>Rights, obligation, and trust in</b>	Family, Kinship	State	Market
	Other relations:	<i>Commodification/Defamilialization</i>	
	Particularistic trust	Generalized trust	

Figure 1 combines Polanyi’s transactional modes and Esping-Andersons Nordic model describing the process of decommodification and defamilialization (Esping Anderson 1999). The Nordic welfare states have proceeded along a distinct path of de-familialization, i.e the role of family, providing individuals with support of all kinds, was gradually became the task of the market (commodification) and then back to the state (decommodification).<sup>10</sup> When the family or labour market fails, to provide individuals the required support, the state is put under extra pressure. The state maintains a relatively ‘decommodified’ wage relation and

<sup>9</sup> The symbolic expression «In God we Trust», the American Dollar note. In contrast “Alt for Norge” Norwegian coroner.

<sup>10</sup> Anderson categorizes welfare regimes into three types: the state, labour market and the family (grouped according to levels of decommodification).

employee friendly policies to sustain egalitarian values. Income and means of subsistence are guaranteed, to a significant extent independent of market forces. Such support of state institutions in turn help maintain, and perhaps even reinforce, the already high level of generalized trust, and thus a continued reliance on the state.

Esping Anderson emphasizes that along with the goal of egalitarian values, continued economic growth is a requirement for the sustainability of the system. Economic growth depends on full employment, and individual motivation to work.

### **Network Embedded Trust and work ethic in Norway**

Trust is a precondition for the transactions and cooperation. In Norway, there exists strong cooperative spirit. They value equality and integrity (Eriksen, T.H.1993). The spirit and the values are embedded in informal social relations. Furthermore, a cultural legacy is that Norwegians have been receptive to trends emphasizing codetermination and economic equalization, which shaped Norwegian collective conscience (*samvittighet*).

Several popular movements in the 19<sup>th</sup> century contributed to the sustenance of the collective conscience and egalitarian values. The Haugian movement is one, led by Hans Nielsen Hauge (1771-1824) A farmer, also a preacher, Hauge travelled around the country, discussed religious matters with people as well as promoting entrepreneurial activities among people. Nielsen mobilized rich and poor, men and women, farmers and small businessmen, spread egalitarian values. Later, labour movement by Marcuse Thrane (1817-1890) led further the egalitarian values. The growth of the welfare state in post World war II - the state provided its citizens with equal access to material goods and benefits.

Another cultural trait is that Norwegians are skeptic to social climbers. They rather show their concern about their fellow citizens. Such a concern is expressed in the notion of “felleskap” i.e. togetherness. The notion has a deep root in the society, and it has a double meaning; fellowship and community solidarity. “Felleskap”, widely shared among the Norwegians, is internalized right from their childhood, and uphold throughout life. If one wants life go well for him or her, he or she must belong to a group and remain true to this common perception of belongingness. Such a shared value shapes their attitude to work, is at the root of strong confidence in others, and stimulates cooperation. Thus, Norwegian “felleskap” explains why people refrain from opportunism, motivates people to work, why

there is no significant malfeasance in economic life, and why high level of generalized trust persists in Norway, and

The state has the aim of maximizing the productive potential of the labor force (Esping Andersen 1999), facilitated by the trade unions, the employers union and major political parties. All the parties have been strong supporters of the work ethic, and the policy of full employment. The state guarantees work for all. Individuals work for economic rewards, also in Norway. However, in Norway, motivation for work includes a strong feeling of reciprocating services provided by the state, as well as, reciprocal obligations to their fellow citizens. Norwegian sense of duty to work embraces moral obligation to others, whether they are in direct interaction with one another or not. Norwegians in general think that if one does not do his/her job may cause extra work for others, and, in a way, he/she is taking the benefit of others' work. Such feeling makes them feel bad; they feel a kind of a bad conscience (*dårlig samvittighet*).

Norwegian egalitarian individualism implies belongingness and dignity of independent individual. Work provides an individual with the sense of belongingness, identity, and work is an important way of becoming independent, and self-sustained. The Norwegians very often look for challenges, work environment providing one with network connections and values they stand for. Works provides one with meaning. Norwegian welfare state is built upon a twofold meaning of work: work as a right and a duty. Norwegians take the right to work as a privilege of taking part in the labour market, work provides one with the opportunity for individual development by utilizing his/her abilities and realizing interest, thus providing self-esteem, self-respect. Individual duty to work includes one's moral responsibility to participate in the economy, and society; a duty both to the self and to the society. A person without works also is obliged to find a job, and take initiative to find a job. Precisely, work is a way of participation and contribution to the society. All these aspects have impacts on Norwegian perception of work ethic. Norwegians, in general, have a higher level of work ethic. Norway is what Arendt termed, already in mid 20<sup>th</sup> century, a labor society(Arendt 1958).

Work is a major connecting link between individuals and the society, an individual become integrated to others, and to the society. Such linkage structures the relationships between an individuals and institutions, and generate the norm of generalized trust in the society. The sense of "felleskap" is extended to Norwegian involvement in voluntary activities. Being served by a retired politician, and previous health minister, at a student canteen surprised me, but, it is not unthinkable in Norway.

The satisfaction we derive from being connected to others in the workplace grows out of a fundamental human desire for recognition- every human being seeks to have his or her dignity recognized by others human beings. It is one of the motors of what Norwegians call “dugnadsånd”, the voluntary spirit, that drives Norwegians to engage in voluntary activities.

The analysis above comes close to the theme of ‘social capital’ theory.<sup>11</sup> Norms of reciprocity in network relations and networks of repeated interactions that sustain trust are termed social capital. These norms operate interpersonally, within the civil society or communities, and obey a logic that is different from that of the state or that of the market.<sup>12</sup>

Voluntary organizations and activities play a very important role in social development. Those also crucial for the living and watchful civil society, to support honest behavior and to banish economic crime. The civil society helps to back trust whenever there is a sufficient number of citizens who feel vengeful enough to work towards exposing publicly the illegal acts or malpractices of both individuals and state agents, and towards bringing pressure to sanction them even though such actions entail significant costs to themselves. A necessary element in the strategy for attaining sustainability is public control through institutions, e.g. formal laws. The success however depends very much on informal social relations and cultural values.

The civil society in Norway includes various interest groups, voluntary associations and labour unions. In addition to supporting honest behavior and banishing criminal acts, the civil society and the government, together, provide some kind of check and balance to the concentration of wealth and power. The norm of civil society, as described above, explains why there is a strong social democratic ideology of egalitarian individualism.<sup>13</sup> Norwegian social norms includes meritocratic ideas, which have been emphasised by all social groups including trade unions. People think and make efforts to maintain the social, economic equality, the key social democratic values, as much as possible. Although there are differences in interests, a consensus exists among all the parties on the core social democratic values. They differ only in the choice of means to achieve the goals and to sustain equality, the core cultural value.

A shorthand interpretation of Norwegian felleskap is in its place here. Individual’s everyday ways of life, actions and interactions constitute the collective attributes of how

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<sup>11</sup> See for instance Putnam 1993 and 1995.

<sup>12</sup> Evans 1996:1033.

<sup>13</sup> Eriksen, G.T.H.

economic and social life is organized. People's interactions with their social environs have to do with people's perception of where they belong, how they organize their everyday way of life. Their interactions influence their thought, feeling, world-view etc., which in turn shape the collective consciousness. Nordic welfare universalism correlates positively with high levels of trust and civic involvement(Bo Rothstein).<sup>14</sup> The state and the citizen rely on civil society in order to improve people's lives. Norwegians put the national interest above particularistic interests; there exists a collective conscience (*Samvittighet*).

### ***Discussion***

The analysis above seemingly appears to be a rosy one. I am quite aware of some challenges the Norwegian welfare state facing today. Mistrust and malfeasance exist in every society, more or less, and it is not unheard or unknown phenomena in Norway. It happens that people evade tax, give wrong information to the insurance companies etc., but very seldom. There are always some exceptions and deviation, in every society. Norwegians, now and then, give expression of dissatisfaction about regulations imposed by the authorities. Some views a decline of social democracy. Mjøset identifies two such groups; the conservatives, some minor parties with much less influence than the social democrats, regularly point to the failure of social democracy. The other group is the left wing parties, often marginalized on the far left side, are ambivalent. The conservatives in the international arena termed the Norwegian welfare a "kindergarten" or "Nanny state". They also think that the state control everyday life, and "Norwegians have tended to embrace control with the equanimity of children who sleep soundly knowing that their parents are just outside the bedroom door"(Bauwer 2014).

The conservatives are skeptic mainly due to their ideological and political platform. Their skeptic views are encountered by development researchers and policy makers. Nordic social democratic values, its achievements in economic and social development draw their curious attention. In the international debate, there are numerous voices from scholars sympathetic to the social democracy. Globalization of Social Democratic values are recommended in order to redress the harm caused by globalization of liberal economic policies, for instance by David Held (Held 2004).

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<sup>14</sup> Bo Rothstein 2001, Social capital in the Social Democratic Welfare State, Politics and Society, vol.29, No.2 and Social Capital, Economic Growth and Quality of Government: The Causal Mechanism, New Political Economy, Vol.8, No. 1 (2003), pp.49-71



It is beyond the scope of this discussion to go into great details of the international debate on social democracy. It rather takes the issues of trust in the welfare state and free riding. The notion of nanny state, in my interpretation, has a positive impact. If we combine the notion of nanny state with Esping-Andersen's de-familialization, and de-commodification we get the notion of "familialization of the state"- the care family used to provide the individuals are now the task of the state. Within a family, there is no prisoners' dilemma since family members have the confidence that the other members would not cheat. They trust one another. The de-familialized welfare state is prone to free riding. But, observation suggests, its generalized trust prevents one from misusing the system and upholds welfare institutions. The system persists even in the face of mounting pressures to retrench. Yet, there is a paradox, as Esping-Andersen raised the issue, the more welfare states seem unsustainable, the greater are the demands for social protection. De-familialization of support and crisis in two regimes, the family and the labour market, put pressure on the state. This raises the issue of motivation to work. I have argued that the norm of reciprocity, obligations and rights in social relations, and the strong solidarity along with its work ethic shape the attitude to work. Norwegians are hard working people and they pursue their interests gentlemanly ways. They hardly accept malfeasance and deceit. Evidence is plenty. Norway does not have the free riding problem in Norway owing to the absence of prisoner's dilemma in the 'Nanny state'<sup>15</sup>, which performs its duty of taking care of its citizens. Norwegians in turn express their loyalty and trust in the state.

Apparently, Granovetter's argument is echoed in the ways the relationship between rights and duties, between individual and community, as well as the ways in which trust is embedded in social relations in the Norwegian society.

The social system in Norway relies on a sense of trust. When one is ill, or away from home, the neighbor trims the garden, takes care of the plants. Such a gesture is reciprocated. When a Norwegian is ill he cannot go to work, it's fine simply to call and let the employer know. While life in Norway is expensive compared to other European countries, with the highest taxes to pay, the benefits outweigh the costs. There are relationships between trust and willingness to accept high taxes. The generalized trust causes and upholds universal welfare state institutions in Norway. The assumption that there are direct links between the level of trust and the sustainability of welfare programs has its empirical evidence in Norway. For further evidence, the findings of a World Bank survey may be referred. The survey found

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<sup>15</sup> The liberal term for the welfare state.

that in Norway, Sweden, Denmark, Finland, more than 60% of respondents think that people can be trusted. For Norway alone it is 73.73%. (Source: Interpersonal trust attitude, 2014). Mean trust in public institutions in these Nordic countries also highest in the world. Trust has a direct influence on economic development (Guiso et al. 2006; Algan and Cahuc 2010). And there are links between the level of trust and social equality. In this regard, the Norwegian score is the highest. The survey further suggests direct link between trust and social outcomes such as trust and educational attainment, peace-full collective decision making, and civic engagement (World Development Report 2013).

Like all other societies, in Norway as well, there are conflicts of values and interests. But, Norwegians resolve such conflicts and provide themselves with enough satisfaction to win their confidence and secure adherence to basic values. Norway relies in good measure on a pattern of responsible negotiating patterns as its solution to these problems- virtually all major economic, cultural, occupational and social groups are organized in nationwide voluntary associations, which have been granted official status to negotiate either with the government or with their opposite numbers with regard to the distribution of rewards, privileges, and obligations. The success of this pattern depends on the degree of responsibility with which the various interests groups fight for their rights, and this, in turn, requires that each organization identifies with the society as a whole, to keep the demands each makes within some reasonable limits. So, the Norwegian society is conflict-full but not ridden by its conflicts. The inherent conflicts are institutionalized, there is ritual of annual negotiation between the employees union and the employers union, with state negotiation. Such institutionalization of conflicts further reinforces the already established generalized trust in the civil society.

Meanwhile, what appears to be a challenge to the Norwegian welfare society is the unintended or unanticipated inequality for the incomplete families. The economic discrimination against single parents and their children becomes especially severe. Tax system discriminates the single parent, and those who have not yet chosen a family life.

Like many modern societies, in Norway as well, there are repeated contacts among transactors or across organizational boundaries. Such relationships may be seen as, what Williamson thinks, a strategy whereby transactors wish to create and maintain incentives for trustworthy behavior as well as to reputation effects onto play (Williamson, 1980). On the other hand, business relations are mixed up with social ones. Firms are linked by interlocking directorates so that relationships among directors are many and densely knit (Grønmo 2002).

Trust is produced by dense interpersonal networks supported by effective codes of limited morality. This is reflected in public discussions and political debates emphasizing the necessity of generalized trust for the sustenance of egalitarian values, rejecting the opportunistic behavior that may take place within close networks.

The welfare programs are sustainable as long as the economic policy of growth with equity and protection of the vulnerable are secured (Esping Anderson 1999). A precondition for the perpetuation of equality is solidarity, which depends on the level of generalized trust. The majority of Norwegians believe that universal welfare benefits reach the population and they tend to rely on the state in creating and successfully maintaining universal welfare state with high levels of taxation where publicly financed social insurance scheme. The highest level of generalized trust explains Norwegian economic performance and its social stability.

### **Concluding remarks**

The developments of the Scandinavian welfare system may be attributed to special set of social organization of economic activities, which include social, political and economic policies. The improvements in people's livelihood were brought about by major political reforms and deliberate creation of new structures, but those were not simply the side effects of affluence. Furthermore, the political legitimation for reforms was that of social equality, better living conditions and opportunities for underprivileged groups as worthy ends in themselves. Providing people with types of resources that allowed for greater freedom of choice, in contrast to restrictions imposed by the narrow bounds of necessity.

The economic activities represent a crucial part of social life and are knit together by a wide variety of norms, rules and moral obligations, which together shape cultural values. Apparently, as the case in hand demonstrates, one of the most important lessons we can learn from the examination of economic life is that a nation's well-being, as well as, its ability to compete, is conditioned by a single, cultural characteristic: the level of trust inherent in the social relations and in the civil society.

Trust is an instituted process, as well as trust is socially constructed. The patterns of interaction changed, hence a change in mode trust; a transition from family and community based trust (also called particularistic trust) to impersonal market and institution based trust i.e. generalized(universal) trust.

In Norway, individuals in interdependent relationships resolve problems and cooperate, seem to be able to recognize the importance of particular affiliations without rejecting the formal rationality of modern society.

As the evidence in hand suggest, reasonably, a general conclusion may be made: trust develops in the mutually formative interplay of public institutions and individuals. Institutions and networks are not alternatives, they complement one another. Network based interactions and trust promoted through such interaction involve a ‘hardening and thickening’ process, thus, trust becomes institutionalized.

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## **Social Protection under good economic performance but social strain: Lessons from the Latin American experience (2000-2015)**

[Sub-topic: poverty and social impacts]

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### **Abstract**

During 2000-2015, several Latin American (LA) countries, like Peru, achieved annual growth rates of GDP – higher than the average rates (2.85%) – of 5.3% (World Bank, 2017). This economic booming generated an increase in the average monthly salary, for example, Brazil showed an increase of minimum wages of 115% in 2015 in comparison of 2000, in real terms (World Bank, 2017).

The improvement of growth and real income salary impacted reducing poverty indexes in several LA countries during the period 2000 – 2015 (Cruces & Gasparini, 2013). Moreover, the Gini index reduced slowly although substantial differences among internal regions (Atienza & Aroca, 2012) and, population groups were evident within various countries. This policy outcome nurtured a conflictive situation. The social strain expressed itself in diverse ways: from a very civilized manner in the streets, like in Chile (Bellows, 2011) and Argentina, up to a violent (Defensoría del Pueblo, 2015) and military styles, like in Brasil (PNUD & Fundación UNIR Bolivia, 2011) and Colombia, from specific dissatisfied social movements. LA enjoyed a good economic performance, but social strain was a sample of showing off the lack of institutional development of the social protection networks. The different public administrations build up an important set of interventions in order to cut off social gaps in LA. However, the micromanagement of the different social protection networks showed a heterogeneous level of performances. This could be explained by the lack of effectiveness of using well proofed management tools and the lack of capacity of institutional learning from past experiences. Therefore, the social protection networks in the different LA countries did not changed in harmony to poor people's expectations for a more inclusive economy: they thought their society was an unfair one (PNUD & Fundación UNIR Bolivia, 2011).

This paper show how far the social protection networks in LA were able to build up institutions that could promote greater equity and increase the impact of growth on poverty. A set of social alleviation programs in LA will be studied in order to distinguish six key management aspects that enabled or impeded the institutional learning of the social protection networks. This six aspects are as follows: how to identify beneficiaries, supply chain management of public goods, system of information, education and training, the monitoring and evaluation systems, the process of graduation of final recipients and, institutional coordination. This paper aims to get lessons from LA experiences of specific actions taking by the governments, during the year 2000-2015, in order to boost capacity and opportunities for the poorest and those who were left behind.

The paper is based on the institutional learning of a set of governmental interventions in LA taking into consideration a life-cycle approach: early childhood (0-5y), Children and young adolescents (06-14y), Adolescents and young adults (15-25y), adulthood (25-60y) and Elderly people (61+y). All the social programs which were considered in this research were focused on improving only the human capital of the poorest in different LA countries during the period 2000-2015.

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## **The Innovative Practice of Using Embedded Learning and Artificial Intelligence to Help the Disabled in Social Integration**

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**Abstract:** Aizhucan ([www.aizhucan.com](http://www.aizhucan.com)) is an Internet platform that provides online recruitment service to the disabled<sup>1</sup> based on Artificial Intelligence (AI) technology. As an important index for evaluating the progress of social civilization, society integration by the disabled has been limited by the society pattern, social cognition and technological development, thus the disabled and their family members cannot enjoy the economic welfare and physical and psychological development brought by equal recruitment, and the social inequality has been enhanced. Through new perspectives, Aizhucan provides organizational and technological innovation to break the barrier of society integration of the disabled, so as to help the development of the disabled, improve the harmony of the disabled family, and promote the equal development of the society.

**Key words:** the Internet platform; Artificial Intelligence; the disabled; ability discovery; employment

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<sup>1</sup> “The disabled” is a general term and is used to refer to people with physical defects and movement inconvenience.’



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# The Innovative Practice of Using Embedded Learning and Artificial Intelligence to Help the Disabled in Society Integration

## 1 Introduction

January 1, 2018 is just the beginning of a new year, while it bears different significance on Xiaohong<sup>2</sup> since it is the first year for her to buy new-year presents with her income to her family members for the past twenty years.

Born in 1994, Xiaohong is 24 years old and is in the age of craving for self-realization and love. However, she caught a cold when she was four and the wrong use of drugs caused her lifelong disability: both of her legs suffered from muscular atrophy and she was recognized as the secondary physical disability. The physical disability did not stop her from pursuing self-enhancement and Xiaohong wanted to go to school, to communicate with her peers and to integrate into the society in order to realize her value just like a normal person. Nevertheless, all her expectations could not be realized after Xiaohong dropped out of school, and she had not been out of home for about twenty years and lived with the care of her parents since then. Living in closed environment makes it impossible for Xiaohong to master enough communication and interpersonal skills, and society integration and employment are beyond her capacity.

In the middle of 2017, Xiaohong joined the Aizhucan Internet recruitment platform with the recommendation of the local government. Based on her previous experience, Xiaohong thought it was also the donation or charity show and she had no expectations for this. However, Xiaohong discovered that it was not as simple as she had believed, since Aizhucan recruitment platform did not help her to find a job, rather it was a platform for her to recruit and provide jobs for other people. Xiaohong was reluctant in the first place for she thought that this was beyond her imagination and ability: she was not familiar with the external job market, and she did not have career market recognition ability and the basic social skills, thus how could her do the recruitment job well when she had difficulty communicating with others. All these doubts made her feel that it was difficult for her to take the job. But in the platform of Aizhucan, Xiaohong saw many disabled people who had worse family and body conditions than her achieved success, which made her determined to have a try. With determination, Xiaohong decided to challenge herself. Firstly, she participated in the embedded learning in the Aizhucan platform and communicated with the candidates according to the indications online and the offline help and support from the experienced in recruitment. She first communicated with the candidates in Wechat and then on the cellphone, by doing so she gradually built up her confidence and enhanced her communication skills through practice. At the same time, Xiaohong read the successful communication logs from the online community for the disabled and mastered the key to online recruitment through learning the experience of other people. Later, with the help of the experienced, Xiaohong had her internship and then started her career after mastering the working methods. With embedded learning and practice for half a year, Xiaohong completed 30 recruitment tasks and earned 40,000 yuan.

Xiaohong commented on her development and achievements:

“I thought being independent to earn money was only a dream, however, it is unexpected that I

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<sup>2</sup> All the names in the examples are pseudonyms.

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can have my own career and actual work to make a living as a normal person. My parents and family members feel happy for me, and I have improved my mandarin standards through the work of recruitment. Many people tell me that I am better than before in terms of language and logic, and I am no longer the burden of the family and society. I have also made new friends and had contact with many new things so as to obtain some new stuff and knowledge. I am not as timid as before and I have cultivated my attitude for independently carrying out responsibilities and broadened my horizons. I live a full life every day with purpose.”

In the Aizhucan platform, there are several hundred disabled people like Xiaohong who suffer from physical disability due to diseases and accidents, at the same time, they are limited by society pattern and awareness so that they have lost the chance for social integration. The practice of Aizhucan shows that many disabled people have the willingness for social integration and the ability and potential for society construction, but what they need is an appropriate platform and opportunity.

## **2 The Shift of Theoretical Perspectives in Social integration for the Disabled: from Simple Ability Endowment to Ability Discovery and Patterned Support**

For a long time, the method adopted to help the disabled is to compare them with normal people and construct the abilities they need based on the abilities of normal people. In the enacting process of the method, we have paid more attention to helping the disabled realize the goals set up by others, while the reasonability of the method has never been doubted, thus the activity of ability empowerment is actually the second-time exploitation of the disabled.

As is illustrated above, the modern production methods use simple standardization to realize economic benefits, resulting in the homogeneity between the modern life and production presentation, and people who are different from the chosen standards are marginalized. If these people are endowed with standard ability, the marginalized effects on them are enhanced and their image of being in the disadvantageous group is constructed, which indirectly influences the recognition of and impression on them by the society. As for the disabled, the positions set up according to normal people do not fit them due to their physical inconveniences, thus they are considered as the disadvantageous that need to be helped. The sympathy on them is like a spotlight so that the society can care more about them, but the long-term influence has been ignored. Sympathy is biased so as to bring us into parochialism and label the disabled, thus the possibility of autonomous activity is exploited. It has to be noted that the social integration of the disabled is not simply a matter of education, fund, resources and so on, but the choice of system and social value. Have we created suitable platform for the disabled? Have we provided equal growth space for different groups of people? Has every decision and action of ours taken the balanced economic and social benefits into account?

We have been advocating the use of social innovation to create a better society, but the biggest enemy is the combat between innovation and the established policies, which is presented as the use of standardized and unified methods to solve the problems of different people and the money funding for all. Most the current assistance projects for the disabled in China are cooperated with governments in standardized pattern or simple donation, and the funding is spent on a fixed number of people; this direct funding not only fails to help construct the abilities of the receivers, but also jeopardizes the original interpersonal relationship. In addition, in order to get government support, a lot of time and money is needed to do document work so as to prove that those projects satisfy the

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government needs. All the above mentioned facts have limited the effectiveness of the assistance projects.

Thinking outside of the box, Aizhucan discovers the abilities of the disabled rather than constructs abilities for them, and further constructs appropriate platform and provides patterned support for the disabled.

Aizhucan first breaks the recognition of the hardship for the employment of the disabled. According to our daily observation and official statistics, the employment conditions for the disabled are not favorable, while the common explanation lies in the insufficient abilities of the disabled. Unlike the commonly held opinion, Aizhucan believes that the difficulty for the employment of the disabled is that the threshold for employment is unfriendly, which is reflected in three aspects: first, the movement in physical space; second, the low ratio of input and output for the employment; and third, the long-term prejudice from the society.

The solutions that Aizhucan provide are not merely meant to enhance the abilities of the disabled, but the patterned construction of support system to make the disabled overcome the limits of the movement in physical space and work for the job with favorable ratio of input and output in friendly humanistic environment.

### **3 The Practice of “Offline Community-Online Platform-AI Tools” in Closed Circles by Aizhucan**

The rise of the Internet provides the opportunity for the disabled to integrate into society. In the early period of the Internet era, the advanced technological nature and high cost of the Internet made it difficult for the disabled to use the Internet. With the wide spread of the Internet technology and the utilization of AI, it is possible for the disabled to embrace the Internet. Under this circumstance, the Aizhucan team immerses itself in Internet outsourcing recruitment and has accumulated enough technology and experience. Through its advantages, the Aizhucan platform is established to care for the social welfare and carry out social responsibilities.

Based on previous work experience, the initiating team of Aizhucan contacted some disabled workers, and their eagerness for self-development and the social barrier triggered the team members to do something for the disabled to change their living conditions. Through deep communication with the disabled, the team members realized that what they needed are not superficial satisfaction, but the value of life in deeper levels. What they really need are not donation, but society recognition and integration. Then how can a consistent platform for social integration be constructed for the disabled? It is believed by Aizhucan team that career participation is the best choice for the disabled. Two hundred years ago, Max Weber, a German sociologist clearly pointed out that the feature of the modern society is the social integration of the individuals through the platform of career. Career has become the only way for realizing society meaning for modern people and all the social issues for the modern people focus on this theme: how to increase employment rate, how to increase income, how to increase employment quality and how to maintain employment stability, and so on. The disabled live in the same society with us and they are definitely faced with these social needs.

Needless to say, previous assistance projects contained various career training and employment recommendation, but most of them were not that useful since they were not established from the perspectives of the disabled and were not close to their life scenes when they were planned and enacted. We need to be clearly aware that career participation is the core element of the modern society, but under the guidance of previous experience recognition, the career tide of the modern

times is the standardized progress directed by industrial production efficiency. In this progress, we have sacrificed the diversity, equality and harmony of the society for the rational economic efficiency, and many social issues have been caused, especially the social integration of the marginalized groups, with particular focus on the disabled. Many endeavors and efforts have been made to help the disabled to better integrate into the society and realize society participation, but they are not effective from the actual conditions.

It is easy to reach consensus on inequality and poverty, but opinions differ on how to solve these problems, and the insufficient recognition of the disabled results in the failure of such actions. Having realized the disabled group and society pattern, the Aizhucan team put forward new perspectives to draft a new chapter for the social integration of the disabled with the help of new scientific technology.

Aizhucan believes in the possibility of everyone in the society and the abilities of the disabled. But it cannot be denied that influenced by the long-term social bias, the disabled have lost many equal opportunities to learn in the socialization process. Combining the abilities of the disabled and the social background that they are in, Aizhucan constructs a closed circle of “Offline Community-Online Platform-AI Tools” to help with the employment of the disabled, which not only enhances the employment efficiency but also the social integration for the disabled, making it possible for the disabled to fully contribute to social and economic development.

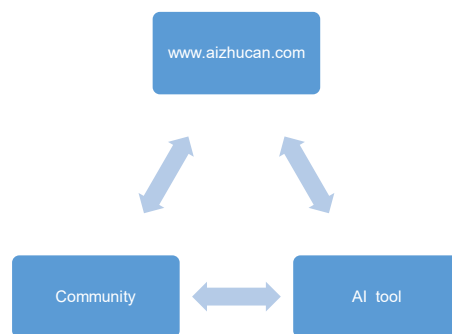


Figure 1. The Model of “Offline Community-Online Platform-AI Tools” in Closed Circles

**Offline Community.** The basis for Aizhucan is to highly motivate the acquired abilities of the disabled, however, since they do not have sufficient education methods, trainings are provided first as well. What Aizhucan tries to construct in the training is the embedded education, which makes it possible for the disabled to construct education channels and spread the training contents in interpersonal relationship with empathy and mutual trust. This can reduce the cost of time and communication, what is more, it can also realize the interaction and communication of education for targeted people and it is an effective way of changing people’s behaviors. In addition, the embedded learning in the community not only helps the disabled obtain skills and knowledge, but also provides them with the recognition enhancement from 0 to 1, self-approval, mutual help in emotion, and so on. The disabled in the platform of Aizhucan can learn together and communicate with each other in the community, so as to improve their work efficiency at home.

**Online Platform.** Aizhucan organizes the disabled to conduct recruitment online and the key of this work is the matched information. The physical defects of the disabled limit the possibilities for them to collect recruitment information everywhere, but in the era of the Internet, it is possible for

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the disabled to gather this information without going outside, and the website of [www.aizhucan.com](http://www.aizhucan.com) created by the Aizhucan team is just a platform for the disabled to conduct recruitment work. As is mentioned above, the initiating team of Aizhucan possess abundant outsourcing experience, and with long-term business accumulation, Aizhucan transfers stable information of the employers and candidates to the platform of Aizhucan, and the disabled who have registered in this platform can obtain this information and realize online communication; while the offline community of Aizhucan provides consistent support for the disabled for mutual communication and the spread of career experience.

The Aizhucan platform not only provides job opportunities for the disabled itself, but also promotes the employment of the disabled by other enterprises. With the visualized processing of the human resources data and employment effects, the platform provides statements for the employers and promotes the planning of human resources of the disabled by enterprises with follow-up services. However, Aizhucan does not replace business actions with morality; rather it realizes the sustainable development of economy by improving the bottom line efficiency of the whole human resources market so as to ensure the efficiency of the whole supply chain, ensure economic benefits, and enhance social influence.

**AI Recruitment Tools.** The core competitiveness of Aizhucan lies in its self-contained AI technology. In the era of AI, data provide us with the support for decision and action, but data do not possess the ability to make decisions so that the experience and insights of the decision makers and enactors are needed. The quality and coverage of the data determine the practicality of the driving data. With abundant experience in the big data, the production and availability of the data by Aizhucan ensure the accuracy of the targeted service of the team.

With big data and AI, the Aizhucan team increases the recruitment efficiency and decreases the recruitment threshold. With the constant collection, data extraction and screening of a large number of CVs, as well as the labelling and categorization of the data, the recruitment positions are matched with appropriate CVs in a quick manner based on intelligent calculation. The whole recruitment process is assisted by the data, while the intelligent calculation is optimized and the accuracy of CV recommendation is enhanced according to the actual recruitment results. With closed tracking of the recruitment process, the AI calculation realizes the basic calculation based on the data pattern and data relations based on the big data of the CV, thus the recruitment efficiency is enhanced by more than 500% and many processes can be automatically completed with calculation. The use of AI in CV screening reduces the dependence of people on professional knowledge and most professional recruitment knowledge is automatically calculated, thus the threshold of professional knowledge learning for people is significantly reduced.

As is shown below, the technological threshold of the employment for the disabled is reduced with the AI calculation. The disabled with basic communication skills can master the competence to conduct online recruitment work and get a stable and decent job.

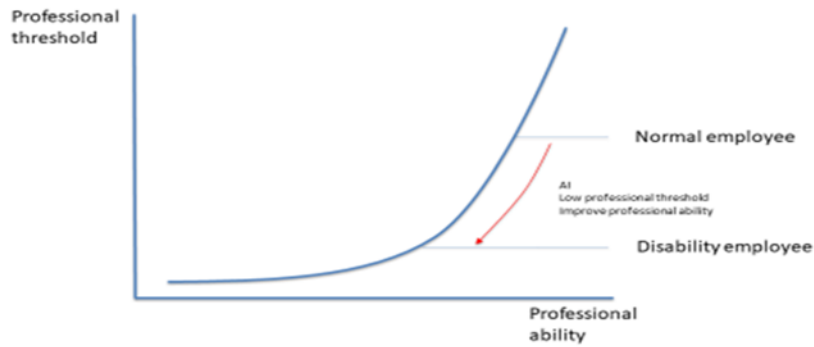


Figure 2. Solutions to the Employment Threshold for the Disabled

#### 4 Conclusions

From what has been mentioned above, Aizhucan aims to promote social employment and social integration for the disabled with the combination of online and offline coordinated development and the AI. The construction of the Internet platform and the introduction of AI technology reduce the threshold for the disabled to conduct recruitment work; while the online and offline communities for the disabled construct the social network for them. For a long time, the disabled are often stuck in their homes without sufficient ways of social communication and interaction, but now they have their own community to help and promote each other and develop themselves together, thus improving the whole abilities of the disabled group and space and abilities to communicate with the society. The aim of Aizhucan is to embed learning into the daily lives of the disabled for their development; and at the same time, to embed work into the daily lives of the disabled for their freedom. It is believed by Aizhucan that helping others is helping one self, thus helping the disabled is helping everyone in the society.

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## Appendix

Aizhucan([www.aizhucan.com](http://www.aizhucan.com)), an employment platform for the disabled with Internet and training, is a social welfare and charity innovation organization that provides training and employment service to the disabled on the basis of the technological advantages and business platforms of Beijing Shenzhou Feisi Information Science and Technology Ltd.

With love as the medium and AI as the tool, Aizhucan constructs a bridge between the disabled and enterprises. Aizhucan uses the AI, namely, big data and artificial intelligence, to provide the platform and opportunity for the disabled to help them master the Internet skills, so that the disabled can realize their life value and dreams on their own without stepping out of their homes.

Since the establishment of the Aizhucan platform in 2016, several hundred enterprises have participated in the industry for helping the disabled, and about one thousand disabled people have successfully found a job with the help of it. Remaining true to its original aspiration, Aizhucan will continue to devote itself to the training, internship and employment recommendation for the disabled.

Aizhucan believes that there are no disabilities in the world of the Internet, and all those with passion for life and potential should not be ignored.



# THE ROLE OF NON-GOVERNMENTAL ORGANIZATIONS IN THE REDUCTION OF POVERTY: CASE OF NAHD DEVELOPMENTAL FOUNDATION

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**ABSTRACT** Poverty in Yemen is both widespread and severe. For decades, most Yemenis lack access to a range of life essentials such as sufficient diet, basic healthcare services, and education. Therefore, the involvement of Non-governmental Organizations (NGOs) like Nahd Developmental Foundation (NDF) has made the initiatives to improve the general welfare of the people to some extent. Hence, this study attempts to bring out the effective role of NGOs in alleviating poverty and provide programs that could help the poor, underprivileged and orphans in several fields such as healthcare, education, and relief for refugees. NDF is among the foundations that attempts to launch various volunteer activities, which play important roles and make a vital contribution to the economic, social and political sectors of the nation. This role is very important to both the public and private sectors, especially when the government becomes unable to deliver emergency relief and essential services as in the current case of Yemenis.

**Keywords:** Non-governmental Organizations, Nahd Developmental Foundation, Poverty Reduction, Yemen

## **1. INTRODUCTION**

Charitable activities are social necessity in all societies around the world, especially in Islamic societies that call for social solidarity. In view of the charitable activities, which lessen the financial burdens of the government, it is essential to carry out this charitable activity by governmental, non-governmental organizations (NGOs) and civil bodies in both developing and developed societies. In recent years, these NGOs have played very important roles in Yemen by providing social services and aids to the needy both in financial or non-financial terms. These foundations have expanded in the world and Arabic countries as well in order to minimize the problems, which tend to hinder the process of development and prepare the citizens to confront solve such problems. The main purpose of the NGOs is to assist and support the development movement by pushing citizens to participate in the development process and improve their living conditions. Therefore, NGOs play supportive roles in conjunction with the government. In some cases, they are considered as more effective than the government to get attached with the grass-root-level developmental initiatives.

Yemen is among the world's least developed countries with their characteristically high population density, unemployment, illiteracy, child mortality, social-communal unrest and currently an ongoing conflict, which has caused a catastrophic humanitarian crisis. Yemen faces acute poverty at high rates, which exceeded 85% with an estimated population of 26 million citizens in need of urgent help (World Bank, 2016). Given the absence of the governmental roles to face such problems, the role NGOs become vital in advocating for participating in and promoting sustainable poverty reduction. Hence, the participations and initiatives played by the NGOs in Yemen have been considered as having positive impacts on poverty alleviation. One of these foundations is Nahd Developmental Foundation (NDF). Since Yemeni society has been plagued by years of instability, poor governance, under-development, environmental decline and widespread poverty, NDF has taken greater responsibility to put efforts to work for the masses with the aim of meeting the demands and needs of poor people (NDF, 2016).

The aim of this study is to discuss the effective role of NGOs generally and NDF in particular, in reducing poverty and highlight some relief programs offered by NDF as a one of the NGOs in Yemeni society. With this aim, this study has been categorized into four sections. The first section is a general background showing the significance of charitable activities and foundations in the area of poverty reduction. In the second part, overview of poverty in Yemen was discussed with emphasis on the need of eradicating or alleviating it. Part three focused mainly on the role of NGOs in promoting poverty reduction through illustrating some relief programs offered by NDF that can address some of the poverty problem in Yemen. The last section formed the conclusion which constitutes a summary of this study.

## **2. POVERTY IN YEMEN**

In general, poverty refers to the unavailability of resources for meeting the basic living standard (Nilsson, 2012). The existence of poverty across the world has been evidenced at least for centuries and the underpinning of poverty situation has been remaining as the feature from the later part of the 19<sup>th</sup> century (Smith & Lüsted, 2010). According to Chambers and Dhongde (2011), poverty is attached with the income capacity of the citizens to meet their life needs. However, Olsen (2010) clarified that the characteristics and trends of poverty all over the world and in all geographical locations are not identical. For instance, poverty in Africa is mostly considered as the result of drought or famine. In Asia, poverty is often due to

political instability or bureaucratic corruption. While in Europe or America, poverty is mainly due to the economic slowdown or losses of jobs.

Poverty in Yemen is both widespread and severe. Most Yemenis lack access to a range of essentials, such as a sufficient diet, basic healthcare services, and education. Women and children are particularly influenced by poverty (El-Katiri & Fattouh, 2011). However, the alleviation efforts of poverty have been constantly thwarted during the past period due to political upheavals and natural disasters. This leads to a huge number of extremely poor households without the means of accumulating wealth. Furthermore, given limited or no regular sources of income, the extreme poor citizens are socially marginalized (access to the state services such as education and healthcare is very little), and food is chronically insecure as well; even though Yemen is surrounded by some of the world's wealthiest countries, located on the Arabian Peninsula (United Nations Development Program UNDP, 2011). Today Yemen is one of the poorest counties in the entire Arab world. According to World Bank Report (2016), the number of Yemeni people who live under poverty has exceeded 85% of the estimated population of 26 million people. The report pointed out that war and conflict, and some economic problems are the main causes of the catastrophic humanitarian crisis that Yemen is battling. In addition, the report added that the fiscal deficit increased from 4% of Gross Domestic Product (GDP) in 2014 to 11.4% of GDP in 2015. With such hard circumstances, the emergence of the effective role of NGOs and their attempt to reduce this acute poverty and provide programs could help extreme the poor in several fields such as healthcare, education, and help the underprivileged and orphans with reliefs for war refugees.

### **3. THE ROLE OF NGOs IN THE REDUCTION OF POVERTY: CASE OF NDF**

#### **3.1 Overview**

Up to the early millennium, poverty remains the biggest problem of the world. Based on World Bank projections indicated that globally, about one billion people live in extreme poverty. Many people are struggling daily for survival and suffering from lack of nutrition, healthcare, shelter, education and other basic needs for survival. Hence, the NGOs have an effective role in helping to alleviate poverty, complementary to government, both in terms of offering core services and in making government strategies more effective (Riddell & Robinson, 1995). NGOs are a type of nonprofit organization. They depend on philanthropic goals as well as social well-being such as, social services, education, healthcare and other charitable activities for serving public interest (Tilcsik & Marquis, 2013). Sakani (2012) stated that FCs have multiple activities and numerous names among which are non-governmental organizations, civil bodies, charities, civil society organizations, non-profit organizations, and voluntary associations. Indeed, the NGOs and volunteer activities play important roles and make a vital contribution to the economic, social and political sectors of a nation. This role is no less important than the role the public sector and the private sector as well, or could be more than the government roles when the government becomes unable to deliver emergency relief or essential services as in the current case of Yemen.

In Yemen, the number of registered civil society organizations increased rapidly from 7,414 in 2011 to over than 18,000 in 2014, 8,000 of them are NGOs (BinAfif, 2016). As indicated by BinMansour (2015) that this number is small compared to the size of the population and their essential needs. However, the extent of contributions of civil society organization in the several fields such as economic, social, and cultural does not appear in the GDP and in the national statistics. Indeed, this makes knowing or estimating their contribution extremely difficult (BinMansour, 2012; BinAfif, 2016).

The existing NGOs in Yemen attempt to eradicate extreme poverty and hunger through providing relief to victims of disasters, healthcare, educational services, and other essential needs. Mostly, the contributions of the foundations could cover a particular region with coordination and cooperation with other foundations in different region in order to help the largest possible number of people live below the poverty line throughout the country.

### **3.2 NAHD DEVELOPMENTAL FOUNDATION (NDF)**

NDF is one of the NGOs, which has a pivotal role in initiating, and implementing the development programs offered to meet the needs of the poor and needy in the region of Hadramout and other regions in Yemen. In March 2013, NDF was licensed by the Ministry of Social Affairs and Labor. The Foundation contributes to community development and cooperation in charitable activities, benefiting from the volunteer capacities and in coordination with the competent authorities. The headquarter of the foundation is located in Mukalla city, Hadhramout.

On Monday, June 27, 2016, NDF and seven other NGOs working in Yemen established the Council of Social and Economic Coordination. This council was founded as an institutionalized platform for uniting the efforts of NGOs to be closer to the segments of society and work together to reduce people's humanitarian need, risk and vulnerability. The council also established a micro finance Fund for fighting poverty and to sustain people's well-being through providing various financial and non-financial services to those who are deprived access to such services. For instance, create job opportunities; improve the financial ability of individuals (male and female) to start their enterprises as well as business development training.

#### **3.2.1 Objectives**

The main objectives of NDF are:

- i. To build a positive generation able to keep pace with the modern time in all fields of science, creativity and knowledge.
- ii. Identifying the needs of the relevant community and develop programs and projects geared at fulfilling those needs.
- iii. Setting up several charitable projects and humanitarian and disaster relief assistance to people in need.
- iv. Open local and international experiences in the field of charity and development, and establishing cooperative relations and real partnerships with other developmental foundations and associations locally and globally.

#### **3.2.2 Vision and Mission**

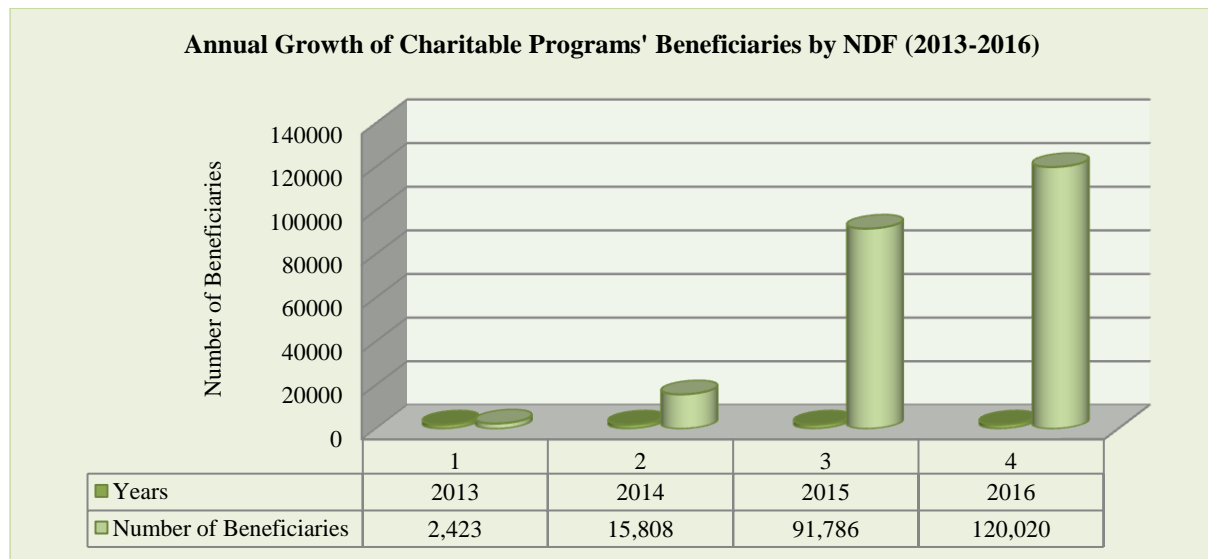
Vision: To be a leader in philanthropy and development.

Mission: Work together and contribute to the well-being of the community.

#### **3.2.3 Programs Offered by NDF for Society**

Notwithstanding NDF's establishment a short time ago, it retained a prominent role in development and reducing poverty, particularly in Hadramout and other nearby regions. Its role is demonstrated more clearly through a broad spectrum of services and programs across multiple fields, ranging from livelihood interventions, healthcare and education services, help orphans, and war refugee relief as well as the volume of beneficiaries, which has shown a

distinct increasing trend during the period from 2013 to 2016. Figure 1 illustrates the annual growth of charitable programs' beneficiaries offered by NDF during the period 2013-2016.



Source: NDF annual reports (2013-2016)

Figure 1

*The Beneficiaries Statistics from 2013 to 2016*

As could be seen from the Figure above, it is evident that since the inception of NDF in 2013 the beneficiaries of programs provided were 2,423 beneficiaries. During the second year, the foundation expanded its diverse programs to reach 15,808 beneficiaries. There was therefore, a dramatic increase of project's beneficiaries in 2015 and 2016 at faster rate to reach 91,786 and 120,020 beneficiaries, respectively.

According to annual report of the offered projects (2016) showed that NDF offered numerous volunteer projects in a variety of areas, such as social programs which focus on orphan assistance, healthcare projects, education projects, and relief activities. The following sub-sections give a general overview of the various programs provided by NDF.

### 3.2.3.1 The Social Projects

In NDF, the social projects refer to mid and long-term articulated and integrated actions, guaranteeing after its completion the possibility of continuity, replication and scaling up of achieved results. Hence, this kind of projects shall effectively contribute to transform a given reality, and improve the quality of life and well-being for needy people by meeting their livelihood social needs.

The foundation's social work covers several basic services such as, project of orphans helping, project of the sacrificial feast (project distribution of meat for the needy), and project for Eid clothes for poor and orphans families, and distribution of food essentials. As stated in the annual report of the social projects of 2016, the beneficiaries of such programs are approximately over than 3,600 (see Figure 2).

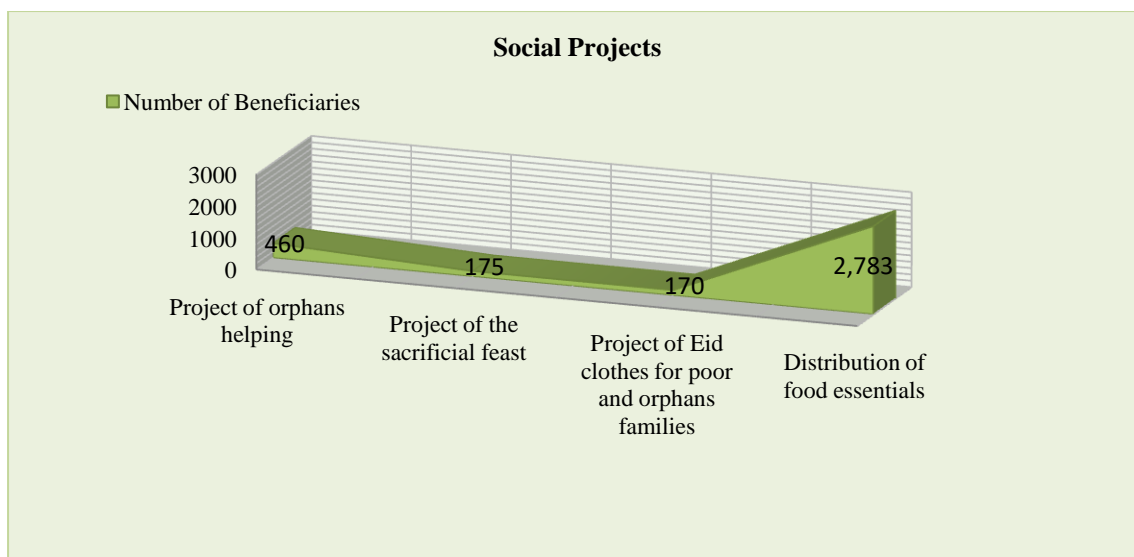


Figure 2  
The Social Provided Projects by NDF (2016)

### 3.2.3.2 The Healthcare Projects

The spread of preventable diseases continues to exact a grave toll on local communities, particularly residents of urban and peri-urban slum areas. Therefore, making healthcare services available to the needy is one of the priorities of the agenda of NDF, which has been working at different levels, in close partnership with the Healthcare Ministry, with a view to enhancing healthcare-related resources nationwide. In addition, to upgrading public hospitals in terms of medical hardware and ambulatory equipment. Or even support those who have chronic diseases to travel abroad for care and medical treatments.

The key to disease prevention is public healthcare education. NDF Foundation funds a number of disease prevention awareness campaigns, which are effectively limiting the spread of the most devastating preventable diseases in targeted communities.

For this purpose, NDF was conducting various healthcare programs for caring the society such as, medical camps and convoys include surgical and consulting of ophthalmology, E.N.T, cancer, orthopedics and surgery, neurosurgery, heart disease, and digestive system renal system and genital, and awareness of disease prevention as well. As depicted in Figure 3, the beneficiaries of the healthcare projects are over 45,800 beneficiaries.

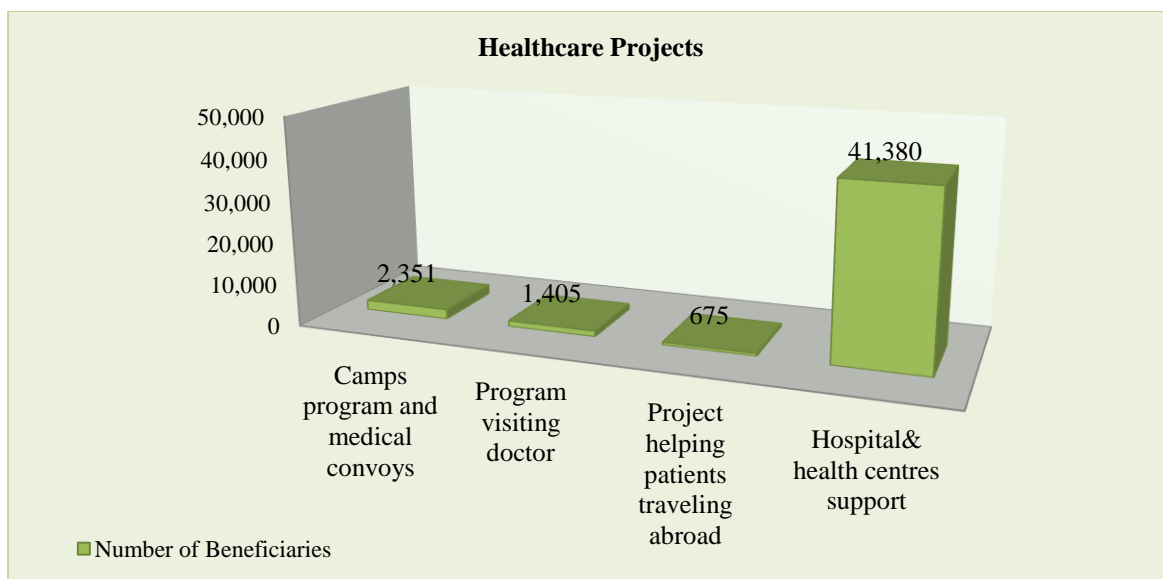


Figure 3  
*The Healthcare Provided Projects by NDF (2016)*

### 3.2.3.3 The Educational Projects

The educational project is one of the most important projects launched by NDF believed to be one of the most important projects that needs urgency as the educational system has been complexly affected in many areas due to the siege, displacement and destruction of educational structures. These educational projects cover not only educating boys, but educating girls as well. Normally girls in Yemen, especially in rural areas, do not have a chance to complete their primary education, let alone their secondary education. Generally, school dropout rates among Yemeni girls are very high due to social customs which, among other things, force them into early marriage (UNICEF, 2012).

NDF aims at offering students several programs that assists in creating a proper educational environment such as, projects on university accommodations, students' transportation, capacity building, etc. This has the effects of producing "successful leaders" in their society. NDF also provides an incentive program for outstanding students and encourage them to achieve good scores. In additional, the foundation strongly helps needy students with financial support in order to pursue their education and to mitigate their financial suffering. Furthermore, the foundation provides many scholarships for bachelor degree so as to give opportunities for them to pursue their university educational process. The foundation also sponsors both male and female students who are willing to continue their postgraduate studies. According to the NDF annual report (2016), it is shown that the beneficiaries of educational projects are exceeded 4,000 beneficiaries as presented in Figure 4.

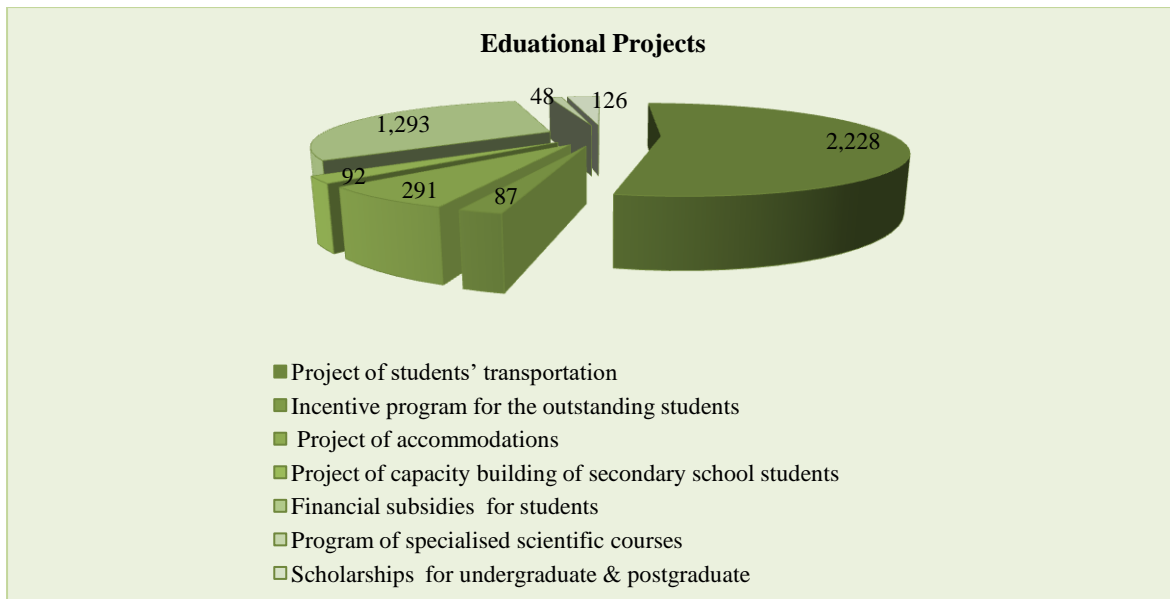


Figure 4  
*The Educational Provided Projects by NDF (2016)*

### 3.2.3.4 The Relief Projects

Since Yemen is in humanitarian crisis and this situation continues to get progressively worse. It is currently undergoing a period of serious internal conflict and insecurity that is resulting in tragic losses to families and communities and the movement of a large volume of the population to neighboring regions. Therefore, NDF has implemented a project of urgent relief to provide urgently needed emergency relief assistance to refugees of war in Yemen. The foundation has launched several assistants to refugees such as, delivering relief food baskets, which contain the most necessary food items for affected families. They also help some rural areas that are suffering from water scarcity by implementing some water projects operated by solar energy to overcome the water shortage, support numerous hospitals and healthcare centers in regions that could not be able to access medical services. Furthermore, NDF has implemented relief projects and emergency assistance for people who were affected by Hurricane named (Chapala and Megh) which triggered destructive flash flooding made a direct hit on Hadramout and Socotra Island, and other relief programs were conducted in the country as shown in Figure 5. The total of beneficiaries of relief projects is almost 66,522 beneficiaries in various regions within Yemen (see Figure 5).



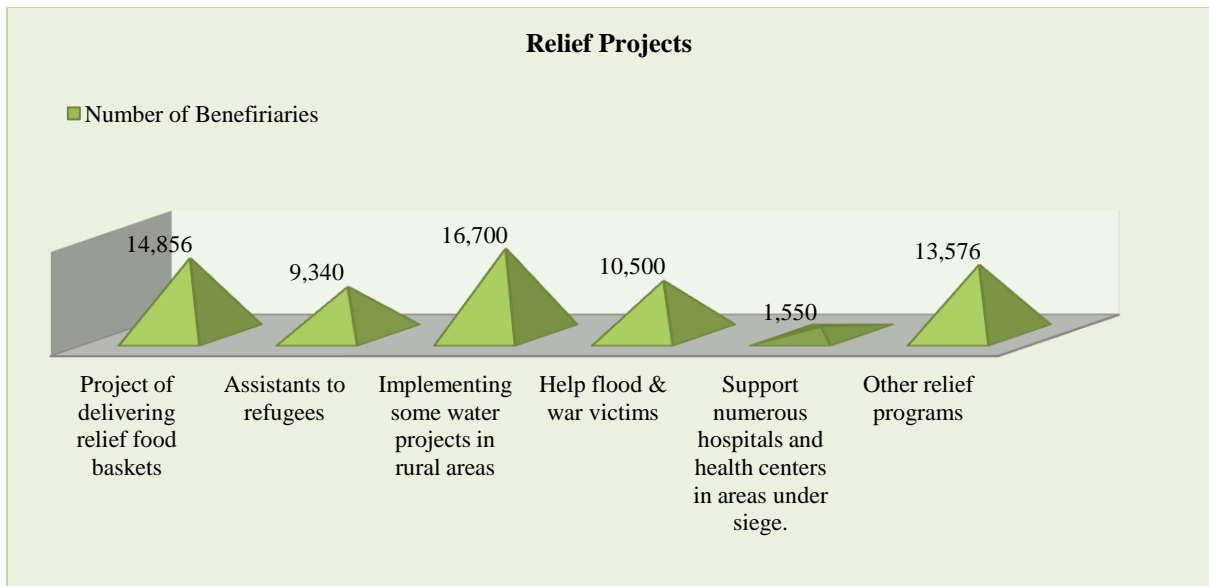


Figure 5  
*The Relief Provided Projects by NDF (2016)*

In summary, the NDF’s role as a charitable service provider, NDF offered and remains offering a broad spectrum of services across multiple fields, ranging from livelihood interventions and healthcare, to education and relief services in specific areas, such as emergency response, and urgent welfare provision to those affected by conflict and war.

#### 4. CONCLUSION

The involvement of NGOs in alleviating poverty has changed the life of the poor in developing countries. By designing and implementing innovative program interventions, NGOs have enhanced the quality of life of the poor and they have facilitated the needy to reach a first foothold on the development ladder. Though these NGOs play key roles in the reduction of poverty, they are however, not “magic bullets” offering total solutions for all problems. NDF is among several foundations that have important actors in providing poverty alleviation programs in various fields in Hadramout region and some nearby regions in Yemen (social, healthcare, education, and relief projects).

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## **¿When do neighbourhood settings matter? Evidence of a relationship between health and physical inactivity in a middle-income city**

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Physical inactivity and sedentary lifestyles have become an important risk factor for health. A vast of evidence shows that population living in urban settings are affected by increasing prevalence of chronic and preventable diseases related to physical inactivity. Physical inactivity has been also related to increased periods of sick leave, work disabilities and health care. Many health programs that are associated with physical inactivity have encouraged the idea of promoting better public spaces and safety to motivate citizens into physical activities. However, cities are not homogenous settings and the provision of public spaces through neighbourhoods and districts varies greatly. Deprived neighbourhoods usually do not have enough provision of public spaces to promote physical activity and exercise among its habitants.

The propose of this paper is to understand how community public goods provision affect health by analysing differences amongst citizen's health conditions by socioeconomic neighbourhood strata. This study uses information from Cali, Colombia. A population survey conducted between 2016 and 2017 in the city allows us to revise the relationship between physical activity and health conditions mediate by neighbourhood public goods.

Logit model results show that physical inactivity is correlate with poor health and obesity, but this relationship varies across socioeconomic neighbourhood strata and is strongly mediated by people satisfaction with the provision of public spaces, transportation, security and healthcare in the neighbourhood where they live.

With decentralising tendencies of provision of social and public services from national levels to localities, cities have become a key player in reducing citizen's health disparities. Promoting a healthy lifestyle tandem with improving security and redesign public spaces such as parks and sports facilities. Providing public spaces focused on deprived residential areas seems to tackle health, socioeconomic, racial and social inequalities across neighbourhoods.

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