



DEVELOPMENT AND DEMOCRACY

Thinking Ahead for
Sustainable Development

INTERNATIONAL CONFERENCE BOOKLET

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OPENING

REMARKS



LENKA SUROTCHAK

Director of the Pontis Foundation

Dear Excellencies, Dear Ms. Deputy General for Neighbourhood and Enlargement Negotiations at the European Commission Ms. Mathernová, Dear Mr. General Director Mlynár, Distinguished Panelists, and Guests:

On behalf of the Pontis Foundation it is my great honor to welcome you this year to the fourth Annual Conference on Democratization and Development Cooperation.

This year is particularly important given that the migrant crisis has brought home to Europe some unforeseen challenges in development aid, but also in shaping our minds and opinions and in the way our value systems as individuals as well as countries are set up.

At the same time, it is a special year since it is the first ever European Year to address development issues and Europe's role in the world. What is more, the upcoming Slovak Presidency of the Council of the European Union in the second half of 2016 opens opportunities to stir a wider professional and academic debate on the importance of the democracy, development and global issues.

Last, but not least, the year 2015 is also the year when the Millennium Development Goals are coming to an end and the international community will launch a new framework for poverty eradication and sustainable development starting next year.

Many stakeholders are involved in combating poverty worldwide, however development organisations had and still have a great opportunity this year to inspire more Europeans to get engaged and actively involved.

Socially and Environmentally Sustainable Private Enterprises can make the change – contribute to the achievement of inclusive economic growth and the elimination of poverty

Nevertheless we shall not forget the role of the governments which shall develop the mechanisms and strategies to fulfil global aspirations on a regional, national and local level. Not less important is fulfilling the commitments agreed by the international community.

For Slovakia this means gradually raising the overall amount of ODA from 65 million Euro to 250 million Euro.

In September this year we conducted a survey among Slovak political parties which showed an interest of politicians in development issues and gave quite a good overview of the Slovak official development cooperation priorities. An absolute majority of the parties declares the need for a gradual increase in Slovak contribution to development cooperation. They believe that Slovakia can afford such expenditure and that this is an investment for Slovakia and the EU which will one day pay off.

We believe that the Development and Democracy conference is a major event which brings new thinking about aid and the system in general. The sharing and dissemination of innovative ideas on global responsibility is key for our common future, because each of us can act consciously and contribute by their consumer, environmental and social behaviour for a better tomorrow and for all people in this world. Therefore, we have made the topic of innovation key to today's conference.

Major ideas on Sustainable development goals and innovations in development will be discussed in the morning plenary sessions; in the afternoon we will discuss a variety of topics which are relevant to development, transition experience sharing, global education and much more.

Our Key note speaker Mari Kuraishi, one of Foreign Policy's top 100 Global Thinkers for "crowdsourcing worldsaving" will talk about „The real power of the crowd in development.”

Today at the closing of the conference, we had originally wanted to use this opportunity for the Minister of Foreign and European Affairs of the Slovak Republic to present the Golden Plaque award for best humanitarian worker. However, we regret to announce a change in the program and sincerely invite all who are interested to see the celebration at the MFEA at the beginning of November. You can also follow this via the Pontis Foundation on facebook or on our webpage.

Finally, allow me to say thank you to the Ministry of Foreign Affairs for its cooperation on this conference as well as its support, to all of the speakers and panelists who have travelled here to share their knowledge with us, and I wish all of us success during the networking sessions in order to become even more effective in our day to day jobs and our vision of making the world a better place to live for everybody.



MICHAL MLYNÁR

Director General for the International Organizations, Development Assistance and Humanitarian Aid, Ministry of Foreign and European Affairs of the Slovak Republic

Ladies and gentlemen, dear friends and colleagues,

Let me start by conveying warm greetings from Mr. Miroslav Lajčák, Deputy Prime Minister and Minister of Foreign and European Affairs of the Slovak Republic. He very much regrets not being able to address your conference at this moment due to his duties related to the on-going visit of the UN Secretary-General.

Today's situation in the world places a number of challenges before us, among others climate change and imbalances in the current economic model, all of which directly or indirectly touch the political domain. Therefore, focused debate on these areas is a must. Inter-linkage between democracy and development stands at the centre of this effort. This has also been highlighted by the complexity of the new development agenda approved by global political leaders at the UN General Assembly recently.

Slovakia expressed itself very clearly in favour of the new development agenda during the recent UN summit on the post-2015 development agenda. We are pleased that among the set of new sustainable development goals there is also Goal 16 on inclusive and peaceful societies. Exactly this goal underlines the importance of good functioning of governmental structures and legal systems.

It's apparent nowadays more than ever, that supporting and strengthening democratic norms is of paramount importance. But we have to be cautious and not replace the call for more democracy by a mechanic approach as this can sometimes lead us to undesired situations. There have been a number of cases recently which can be used as examples of this need.

While talking about democracy we, as actors in the field of development cooperation, greatly count on civil society which represents one of the keys pillars of solid democracy. Through its activities, civil society contributes to the expanding circles of wider society taking

part in social debates on topics concerning the whole society to mention at least one of the elements of its essential contribution.

Civil society engagement in Slovakia is already a given. Its presence is felt essentially round discussion and negotiation tables, it offers its own proposals for solving political as well as social issues, as can also currently be confirmed by the Call for Humanity Initiative.

It is a fact not needing to be explained in detail, that civil society has always played a crucial role in Slovakia's transformation. This is an asset we can build on even in today's activities in the field of development cooperation. Therefore it is not surprising we have tied up on the know-how accumulated throughout this process and even offer it to our friends for sharing within a specially designed programme for experience sharing under the umbrella of Slovak development cooperation.

Also the new 2030 agenda for sustainable development proves to us that development and democracy walk hand in hand. There is no good democracy without development and there is no space for sustainable development without democracy, rule of law, good governance, as well as stability, peace and security.

One of the main lessons learned from MDGs is that not only did they not place enough emphasis on sustainable development but left out crucial issues such as peace and security. For instance, failed states were unable to fulfil their commitments and that's why the rule of law and good governance is of utmost importance.

The current migration crisis only confirms the fact that the majority of humanitarian crises today are caused by violent conflicts, political instability and, let me be more specific, disrespect to democratic values. Millions of people uprooted from their homes, unable to cater to their basic needs is a manifestation of an inability to solve political and social issues by democratic means. The link between democracy and development is, therefore, very clear also in this context.

It is also in this regard that Slovakia has been a strong supporter and active facilitator of Security Sector Reform processes (including in this context the SDG Goal 16). We advocate for SSR both in political (UN Group of Friends) and practical terms, through Slovak Aid projects.

There were a number of extremely interesting and relevant statements during the recent global summit on SDGs in New York. On that basis I believe we need a clear understanding that cooperation cannot and should not be a charity and a one-way street. We have to try to identify activities which not only deliver to the people in need but also include them in the related processes and possibly enrich our understanding and practice of what we are doing. Innovation in development cooperation, developing countries as a source of important inspirations (which I can see among the theses of your conference) must represent an important dimension of our overall effort.

While fulfilling our tasks, we should also bear in mind the role of other relevant actors and interested groups. SDG No. 17 of the new agenda on Global partnership firmly confirms the necessity of civil society inclusion: non-governmental sector, as well as the private sector, academia, philanthropists and others all need to be involved in the process of the new development agenda implementation. What will be key now is implementation. The Ministry of Foreign and European Affairs is counting on continued cooperation with the civil society and non-governmental organisations in implementing the goals of Slovak development cooperation with our partner countries, as well as the global development agenda.

PLENARY

LECTURE



THINKING AHEAD FOR SUSTAINABLE DEVELOPMENT

THOMAS VOGEL

Head of programmes for HORIZONT3000

Dear colleagues, dear supporters of development and democracy,

It is a pleasure for me to be here today, and an honour to be entrusted with the key note on “Thinking ahead for Sustainable Development”. I wanted to thank my dear colleagues from Pontis Foundation for that invitation.

SDGs: the new framework, the new regime for International Cooperation

Before thinking ahead, maybe we should first have a look at the previous regime, the MDGs. In my professional experience, I have learned that it is always good to analyse the past before looking into the future.

Overview MDGs:

- Poverty reduction
- Education
- Gender
- Health (fairly detailed)
- Environment (in general terms)
- Global partnership
- Performance: Quite a lot of green overall, although not all the targets have been met, this is still considerable progress
 - The goal of halving the number of people living in absolute poverty was reached in 2010 - although this isn't attributable to international cooperation, but to the growth rates in the BRIC countries.
 - Primary Education: Back in 1990 one in 2 children went to primary school, Today 4 out of 5 go to school and the proportion of female students is close to 50 %.

- Child mortality fell by almost 50 %,
- The same can be said about maternal mortality. However, the aim was a reduction by 75 %.

Do we need any regime at all?

What is the point of setting targets?

Experience has shown that once people analyse their income and spending, once people draft budgets, they automatically improve their financial performance. To have financial targets improves financial performance

The same holds true for deadlines in our calendars: once we have targets to meet, we tend to improve our time efficiency.

What are the most important differences between the MDGs and the SDGs?

- Content
- Scope (world)
- Process (participation)
- Costs (0,7 % vs. 4 % of gross world product = 3 120 billion US\$)

Challenges that come along with the SDGs:

- Cooperation – humanity is forced to overcome many differences - Chance as well as Challenge
- Costs
 - Has the ODA spending since the 1960s been a lot (2.500 bn compared to 135 bn in 2014)?
 - West and East Germany since 1990
 - Can we afford to implement the SDGs (can we afford not to do it?)
- Yes, we can, and yes, we should (draft national plans)

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NOTES



PLENARY SESSION:

SOCIAL INNOVATIONS FOR SUSTAINABLE DEVELOPMENT

Developing countries are increasingly viewed not only as recipients, but also as a source of important innovations with great social impact. Some well-known examples are Grameen Bank that offers microfinance also in the USA, and the Kenyan M-Pesa service by Safaricom that created a whole new and rapidly growing mobile banking industry. Mobile banking allows for many other innovations. For example, M-Kopa Solar offers poor rural households off-grid solar power on a pay-as-you-go basis. Muhammad Yunus, the founder of Grameen Bank, and French business school, HEC Paris have been trying to develop various social business models in Western Europe that radically differ from both the low-cost offerings and CSR initiatives. Organisations like Ashoka have been supporting social entrepreneurs for more than 30 years and maybe now the time is ripe for social business to become the mainstream way of doing business and creating social value in the process.

Moderator:

- **Eszter Vitorino**, Global Reporting Initiative

Speakers:

- **James Ndiga**, iHub Nairobi
- **Ivan Debnár**, the Spot
- **Masha Cheriakova**, Eto Belarus Detka
- **Aleksandr Skrabowsky**, Social Weekend

The moderator started by asking what sustainable development is and stated that the Sustainable Development Goals are universal and also offer opportunities to businesses to get involved. She introduced her organization, Global Reporting Initiative that focuses on the transparency of companies and sustainability reports and asked the speakers to talk about their activities.

Masha Cheriakova:

I was born in Minsk and my family moved to the Netherlands when I was young. Three years ago I decided to return to Belarus and engage with local youth. While working at Unesco I saw many people interested in social business, but there was no infrastructure for that. We started SocStarter, a program for young Belarusian social entrepreneurs and also cooperated with Aleksandr Skrabowsky from Social Weekend. People in Belarus are not yet used to thinking in terms of producing business solutions to social problems and are rather passive in this respect. In our programme we have trained sixty social entrepreneurs with the assistance of Dutch and German trainers and mentors. I want to stress that the international experience is very important, especially for quite closed countries like Belarus. Eight social entrepreneurs went on a study visit to the Netherlands where mentors tried to get them out of their comfort zone. We saw a gradual change in their mentality. These young people realized they can raise money and that they can sustain themselves.

We have finished two SocStarters, but we don't have long-term stable funding. So the question is how to develop an ecosystem and space where business and social entrepreneurs can meet and think in solutions already at a young age.

By the way, I wrote a book about the Belarusian identity and stereotypes with funny cartoons and it is popular both in gift shops and also in the expat community. It's called *Eto Belarus, detka!*

Eszter Vitorino:

I also live in the Netherlands and have observed the mentality: "If there is a problem, you fix it." How can you cause a similar shift in Belarusian mentality?

Masha Cheriakova:

For example there was a lady in SocStarter and her project focused on helping young women to reduce drinking. She had an emotional and positive experience when she realized that she could raise funding for such a social enterprise, and there are people who actively build communities around social enterprise and get-togethers.

Aleksandr Skrabowsky:

I was involved in various R&D and IT business projects but I needed a break and change. So I helped to start Social Weekend back in 2010 to support socially beneficial projects. So far we have had over 600 participants who have competed with their ideas. We have invested more than 200 thousand dollars in the winners. I agree with Masha that social entrepreneurship is not that strong in Belarus but must say that only 8 countries in Europe have regulations that promote social enterprise.

Everybody has a dream, but people need to work. So dreams happen on weekends or in the evenings. In addition, companies which are active in corporate social responsibility do so often also to promote their product and brand. But one good innovation is social investment and we need to promote it more to business. We have had success stories in social investment, which combine return on investment with social impact.

I like the TED talk by Michael Green, the author of the Social Progress Index, where he explains that each extra dollar buys less and less social progress. So it is not only about the money but the question how we effectively scale up innovative methods.

Social Weekend is an example of how our citizens realize their dreams. It is organized by MaeSens, a successful social start-up that I co-founded. Through MaeSens people can auction meetings with other people and the proceeds are invested in a social cause. This has raised more than 500,000 dollars from individuals so far, which is quite a lot for Belarus. One example of an innovative idea, which combines social and business value, is a city tour guide company that employs blind guides that accompany tourists and show them the city while their eyes are closed. Also the project of “invisible painting”, where a statue actually made it into our National Art Gallery and this kind of effort opened discussions about the national policy towards blind people.

Eszter Vitorino:

Thank you, you have made the important point that social enterprise projects are easier to scale-up as they also generate some revenue. And you have presented success stories and I hope you have motivated some people to get into this field. Let’s now turn to technology and continue with Ivan Debnar.

Ivan Debnár:

I started to do business some 20 years ago was one of the pioneers of the Slovak internet business. I opened the first cyber cafe and started the first search engine and list of Slovak web pages called Zoznam.sk. I met many other people with a technology and advertising background. Five years ago we started to co-organize the first meetings of wannabe tech start-up entrepreneurs. And three years ago in 2012 I founded The Spot, the first Slovak start-up hub. Along with the focus on tech start-ups, the Spot aims to change the mentality of Slovak people, which is similar to the situation mentioned by Aleksandr in Belarus. The culture and acceptance of failure is not well established and young people are too risk averse.

At one point the government decided to also support start-ups, which I find unfortunate. The traditional governmental approach to supporting start-ups can be counterproductive. Officials start with drafting strategy and action plans. Once these are put in practice, often actors from the private sector feel they can reduce their support for innovations. The government instead of supporting existing initiatives and ecosystem created their own initiatives and which then turns into an unfair competition. We often see that these top down approaches are not well picked up by the recipients and might end up as a waste of money.

On a positive note – technology has really developed over the last couple of years and has enabled people to get together and crowdsource and crowdfund solutions. They can also leverage and create other social businesses that deal with daily issues of ordinary people. Now there are many big data tools so it is a good time to be in.

So my advice to the government would be to:

1. Be inclusive if you want to support start-ups and abandon top-down approaches
2. Don’t crowd out and compete with the private sector

Eszter Vitorino:

Maybe you have heard about the toolkit that the World Economic Forum together with the OECD have just published. It is a guide to so called Blended Finance, which shows how to mobilize and mix private capital and state funding for development goals.

I have a “tech dummy” question: Why are tech companies important for our economy? If so many tools are open source then where is the business?

Ivan Debnár:

I think you have hit the nail on the head. In social entrepreneurship that often deals with marginalized groups it is often very hard to find a viable business model. But generally tech companies are easy to start and scale globally as they don't require big capital investments such as machines and warehouses. A lot can be done with a small amount of funds.

Eszter Vitorino:

It is really nice to see that any field can offer opportunities for entrepreneurship. I hope this discussion will continue over lunch and if you have some ideas or questions about scaling-up and funding of social enterprise, approach our speakers. We were in Belarus and in Slovakia, now James, take us to Kenya.

James Ndiga:

iHub stands for "innovation hub" and was established in Nairobi five years ago. It is the oldest and largest ecosystem in Africa. We have helped around 180 companies to develop ideas into a minimum viable product (MVP) and then to a stage where they started making money.

Today in Africa more people have access to high-speed mobile internet than to electricity. This is quite an interesting development. Mobile phone penetration is round 53%. Many interesting innovative start-ups grew around mobile phones. We consider it as the 79th human organ. In the morning if you leave your mobile phone in your car, you rush to get it. We have our own solutions in our pockets. Many of you might be familiar with M-Pesa and the mobile banking that was born in Kenya. But we have also many interesting social innovations that have hit the market recently. For example in the health sector, Totohealth advises mothers on pregnancy and health related issues via basic feature on a mobile phone and helps them to connect to doctors and get supplies of medical and hygiene products for reduced prices. Another example is the M-Farm application that connects farmers to local markets and provides information on prices and lets them sell their produce.

These examples represent solutions for the so called "Base of the Pyramid", the bottom billion people with low but rising income in developing countries. Many Kenyan tech entrepreneurs are trying to solve current social issues and they are also scaling globally. We don't care about government. We know their policies and protocols but they take a long time. But if there is something innovative that serves society, let's do it! The government will catch up later.

Also in the education sector there are some innovators. Kenya has just experienced the longest teacher strike in its history and during the two month strike some young tech entrepreneurs already launched mobile tutor applications to capitalize on the opportunity and help students to prepare and revise for the final exams.

But all of this cannot be achieved without partnerships. We have many corporate partners like Google and Microsoft who want to innovate around solutions for the Bottom of the Pyramid.

Eszter Vitorino:

It seems there is a lot going on in Kenya! Let's connect what has been said to the bigger picture of SDGs. What are your recommendations for example, for the upcoming Slovak presidency of the Council of the European Union in the next year? How should they approach

youth unemployment and economic growth that are always a priority and how would you pitch social entrepreneurship in this picture? The second question is – how do you imagine social enterprise in five years?

Ivan Debnár:

Try to stay away from government grants because they will suck out your energy. But government should invest in infrastructure and capacity building and there should be a long-term commitment for it so this ecosystem can develop and reproduce itself.

For the Slovak Presidency in 2016 I would suggest trying to set an example of being a government that tries to regulate less not more. This will make it easier for people to even enter these social ventures. As James Ndiga said – anyway we will do it ourselves.

James Ndiga:

Just start now and start small. If someone doesn't believe in your idea it is probably too big. So start now and later he will come and invest in you.

Masha Cheriakova:

In Belarus it is important to educate the government. They need to see positive examples otherwise they can make it tougher for you to operate. However, try not to be too involved with them. Holland is a different matter; the government does support start-ups and social enterprise through universities. So I would suggest to the Slovak government to give money to an extra layer that is less bureaucratic for example through universities.

I hope social entrepreneurship will get noticed in Belarus, because currently there are only a few examples to showcase. I hope in the future, that there will be people who are proud that they made money and at the same time made people happy and helped to solve some social issues.

Aleksandr Skrabowsky:

The convenience of doing social enterprise will increase in five years. There will be a greater exchange of expertise between people across borders. Educate governments on Sustainable Development Goals. Focus on impact and core problems. Invest in infrastructure and human capital.

Eszter Vitorino:

I think this was a good round of points made by our panellists. So governments can help, sometimes by moving out of the way, sometimes by being more active, inclusive and open to listening. Regardless what sector you come from, everybody has a role in the framework of Sustainable Development Goals and can contribute to achieving them also through social enterprise.



THE INTERNATIONAL VISEGRAD FUND DISCUSSION PANEL A: HOW TO BUILD AN EFFECTIVE AND TRANSPARENT CIVIL SOCIETY IN UKRAINE?

Ukraine, with its internal political, social, economic and ideological divisions is facing military interventions and severe security problems. On the other hand, the majority of the population live in relative calm, having to deal with the daily struggle with the consequences of the deepening economic crisis. Despite Ukrainian political developments after the Majdan revolution, this society is facing a profound crisis, caused not only by the serious economic situation and presence of the conflict of war, but also because the government has not implemented the necessary reforms, in particular in the sphere of combating corruption and the facilitation of humanitarian aid. In these current circumstances, what role should be played by civil society in Ukraine? What needs of its polarized constituencies should be addressed? What kind of support does civil society require from its supporters and partners in Europe? Are the “traditional projects” of building capacities of the NGOs, promoting public participation and advocacy efforts and fostering cooperation between civil society and business relevant, or is there a need of a shift in mind-set?

Moderator:

- **Pavol Demeš**, German Marshall Fund of the U.S

Speakers:

- **Ivan Mikloš**, National Council of the SR
- **Rafał Antczak**, Deloitte Consulting SA
- **Veronika Movchan**, Institute for Economic Research and Policy Consulting – IER
- **Vladka Votavová**, AMO

Introduction:

Pavol Demeš – raised the basic question:

Where is UA from their perspective, what is present state of the civil society?

Ivan Mikloš

The situation in UA can be seen from 2 different perspectives:

- (i) UA has done much more than many other countries within last 25 years, it chose the right direction; the precondition of this were Majdan, presidential elections
- (ii) On the other hand there is a much greater necessary to, e.g.:
 - Improve the **relations between government and parliament** – only 36 % of legislation submitted by the government has been approved by the parliament, where coalition parties have the majority (in comparison with Slovakia where this is almost 100 %) – there's a need for coalition unity!
 - implement **reforms**:
 - The country is missing strong leadership – leaders to implement the reforms; there is not sufficient courage to push the reforms BUT the reforms MUST be done because society needs it!
 - government deficiencies in communication – there is a strong need to communicate the needs of reforms, the public do not understand – this has caused the growth of populism and failure to trust the reforms and government
 - reforms are a political not a technical issue

UA is a **society very much achieving below its potential** – everywhere: in industry, agriculture etc. It needs reforms to create a functioning market

Role of the civil society (CS):

- strong
- influential BUT
 - threat of the populism on the side of CS – what is and is not possible, what are real and not real reforms
- They are one of the biggest opponents of the proposal of public finance reform

Vladka Votavová

- Czech NGOS are very active in UA
- CS has the potential to drive change
- today CS has a bottom up push for change of the regime
- many people around Europe and the world are starting to be fed up with issue of Ukraine
- the international community has to accept reforms in UA; these were chosen by Ukraine itself
- EU should be aware that reforms are developing
- CS plays integral role, sometimes even substitutes the role of public administration
- role of CS in UA now:
 - innovative original answers
 - part of the implementation process
 - CS leaders have the capacity to enter public administration

- public administration representatives and politicians are taking part in CS events have changed the society
- What should CS emphasis in their actions:
 - raising awareness and public participation, not only from youth but they should also involve adults,
 - radicalization in order to increase education
- Strong propaganda showing the urgent need of civic education; especially the need to work with teachers on EU awareness

Veronika Movchan

- CS is the mirror of the society
- real activism of CS was achieved before Majdan
- result of Majdan: it is not enough to change the leader, but it is necessary to continuously monitor the situation
- current CS in Ukraine:
 - CS is very diverse
 - It's sometimes also very populist
 - participation of CS in decision making processes:
 - National Council – make all stakeholders communicate on reform solutions in an informal platform
 - 2 platforms (formal bodies) involving the CS
 - CS forum of eastern partnership
 - CS platform for association agreement (third sector+??)
 - Several other working groups are working on facilitating dialogue, initiated by different bodies: NGOs, ministries, etc.

Rafal Antczak

- UA has now the unique situation to shift from east to west
- **Why is the situation in UA wrong?** After 20 years the situation in UA hasn't changed much. But before society had a common goal – the EU.
 - people solve everyday problems, e.g. what to eat ...; not that interested in development of civil society
 - now is the time to decide about the future direction of UA: east or west
- UA did not take advantage of collapse of the Soviet imperium
- Reforms: there are two approaches: i. concentration of small technical reforming details, or ii. Reform of fundamental changes. This has been the mistake of UA and the international community. Initially they concentrated on technical details, however now is the last chance to introduce real reforms!!!
- The result is and the answer to the question *Why the situation in UA is wrong* is that UA is not yet at breaking point.

Pavol Demeš

What are the main areas of public criticism?

Ivan Mikloš

- The only option now is to carry out a “breaking reform”. Not to make small changes as system is highly corrupted and highly influenced by the existence of the oligarchs
- According to the **public polls** in 2014, 35 % of the population considered that the country was going in the wrong direction and 55 % in the right; in 2015: 15 % think the country is going the right way and 70 % think it's the wrong way! Reasons:
 - too high expectations
 - decrease in the economy in 2015 of 12 %
 - before Majdan 10 % of the population did not have enough food / now: 20 %
 - lack of leadership, ownership and communication – need to communicate this is price of NOT doing reforms
 - insufficient **communication** to explain the necessary steps to people
 - it has not been done enough
 - only real reform done: police reform
 - energy price was the biggest corruption issue – there was major increase in energy prices and the government did not communicate on this issue publically. An explanation campaign was missing



DISCUSSION PANEL B:

IMPACT OF GLOBAL CITIZENSHIP EDUCATION INTERVENTIONS

Much effort is put into Global Citizenship Education (and other related approaches such as global education, development education, etc., further referred to as GCE for simplification), from formal education and public awareness raising to campaigning and advocacy towards politicians. GCE provides not only facts, but aims to develop skills and challenge attitudes across a long-term period. Yet, how do we know our GCE efforts make any difference? And if we do know, how do we use this knowledge?

In Slovakia, evaluations of GCE projects have been limited so far. We need guidance to systematically evaluate impact of GCE on the project, programme as well as national level. Such evaluations would inform active citizens what difference they have made. Further, they would demonstrate to the policy makers that there is a critical mass of people who demand that issues such as unfair trade or labour practices and climate change are addressed. Evaluations could also advise GCE practitioners, donors and policy makers what does or does not work and how to shape GCE interventions and related policies differently.

Scholars and practitioners are invited to send case studies of GCE project or programme evaluations and research studies that have effectively dealt with the issues above. Contributors should present evaluation methodologies that clearly show the impact of GCE interventions and how the evaluation output was used. A more general discussion is further expected on how to make the GCE more evidence-based and influential on the policy level.

Moderator:

- **Simona Šafaříková**, Palacký University in Olomouc, Czech Republic

Speakers:

- **Rilli Lappalainen**, Kehys, Finland
- **Krzysztof Stanowski**, Executive Director, Solidarity Fund, Poland
- **Jenny Williams**, Habitat for Humanity, Northern Ireland

- **Peter Drál**, Milan Šimečka Foundation, Slovakia

Special Guest:

- **Helmuth Hartmeyer**, GENE, Austria

The discussion was dedicated to two major issues:

- **how to evaluate the impact of global citizenship and education**
- **how to use this evaluation in a practical way**

I. How to evaluate the impact of global citizenship education

Rilli Lappalainen:

- Purpose of the evaluation is to learn from the evaluations
- Systematizing – the learning process should become the fundamental and systematic part of work
- Self-evaluation, learning from each other and external evaluation
- DEAR project which lasted 12 years and which dealt with research on the meaning of education. Rilli concluded that six key elements are important for evaluations (these differ from the OECD/DAC criteria):
 1. pedagogy – how experiential learning and teaching are carried out
 2. Capacities and capabilities – who are the learners
 3. Promotion of values / solidarity, justice, democratic participation
 4. Comprehension of content – how much you understand the environment
 5. Does it stimulate learning? Does it encourage a person to learn?
 6. Social transformation. How much you see yourself as a change agent

Krzysztof Stanowski:

- Case study from Mongolia – Success story of collaboration between the civil society and the Ministry of Education of Mongolia. They still use the guide book that was developed several years ago for education and now has its 4th edition.
- GENE and peer review process (with ministries and NGOs) have been very helpful in Poland, now there is peer review material used in GE, they have cross-sectoral dialog and agreement on global citizenship education and support from ministries.
- Evaluation today has new elements – situations and circumstances are changing, e.g. refugee or political issues in Poland. Teachers also have the problem that they do not know how approach new subjects (e.g. migration) in the education process.
- The question must be: who are the teachers and learners?
- Evaluation should be used in order to change the future.
- Nowadays we can observe Russian funding in the Polish education system which is becoming a political issue.

Jenny Williams

- Northern Ireland is very small (only 1,8 million people), which enables HfH to communicate well with people and to be able to reach them, HfH was able to test different methodologies

- The important thing is to measure the impact right from the beginning and at every stage of the programs (beginning, process, end)
- The evaluation as we did it, measures short term as well as long term goals to be achieved through volunteering
- Habitat engaged volunteers in Cambodia, built partnerships with universities and students went to Ethiopia,
- University of Ulster – for over 10 years students were travelling to and worked with Habitat for Humanity Ethiopia. They can confirm the impact this had on them, many of the students chose a career in development (after the program students very often do advocacy on the ground)

Peter Drál

- Measuring the impact in education as such is a contested issue – there are very fierce debates about how to do it and what to assess:
- Should it be standardized or tailor made? Should we measure the progress of the people or the achievements? We still measure knowledge and skills which is easier than measuring values or attitudes.
- We may learn and teach more on SDGs and MDGs, they can teach skills, but if it is not embedded in values – students or teachers will not implement it.
- There must be motivation to enter improvements of values (Solidarity centres in Czech Republic, Slovak Republic...).
- But any change which has been achieved is meaningful.
- There are no standardized approaches to measure change in values, we need to standardize values. But is it possible?
- Even if you succeed in that kind of intervention in the educational process, it is necessary to keep in mind, that teachers are not the only ones who influence the values and attitudes of the learners. There is a definite influence of the family environment and then significant issues in public life e.g. the refugee crisis and influence of the media which shapes human opinion and creates, for instance, a phobia of refugees. GE is now becoming a political issue.

Questions from the audience:

1. Natalia Šovkopljas, the Union of Towns and Cities of Slovakia

Global education is a political issue. How can we motivate and include the local authorities to enter programs of development and global education?

Krzysztof Stanowski:

- In Poland we do not have any state owned schools. These were decentralized from the beginning. Schools are owned by local authorities, partially by local NGOs.
- Civic education is implemented by the local authorities in collaboration with NGOs.
- The ownership and most important decisions are taken by teachers and local authorities; there is a very close relation between these actors.
- No politics in education, competitions for schools to work with NGOs – however the decisions are taken by the school principal.
- NGO – >Education -> OPEN EDUCATION
- Involvement of Local Authorities and CSOs is on a fully voluntary basis.

Rilli Lappalainen:

- Good example of Finland – city of Espoo – it is called Sustainable City – sustainability is part of the values of the city... It works from the highest level to the lowest level in the city...
- They think about how to involve all relevant groups, how to achieve good governance, how to deal with the refugee issues... the work is centred in clubs (attempt to engage all – sport clubs, scouts or whoever – all of them can learn how to recycle, they have the choice of the vegetarian food, organic, etc.) – it really goes to the practical level
- This is an example of engagement on a horizontal and vertical level.

Jenny Williams:

- Active citizenship among young people – 20 schools engaged in Northern Ireland – to feel poverty and challenge politicians... Local and global is the key part of everything they do.

Peter Dráf:

- We do not have a system which would create the opportunity for teachers and local authorities.
- We do not have a tradition of the local self-government.
- We are not challenging the government enough.
- Any involvement of the Local Authorities cannot be imposed from above (by adopting a law), the only way is to start the work on the grassroots level:
 - We need to create a demand of people in classrooms – then reach out to the community and parents
 - Present good examples e.g. reforms in Poland, they have a whole school approach, these could then lead to the changes in the law

2. Deepali Sood, Habitat for Humanity Bratislava

How do you measure attitude change? What makes people not fear refugees e.g. in Vienna, what makes people here fear refugees?

Krzysztof Stanowski:

- One of the main aims of Poland was to make conflict between Poles and Ukraine
- In the last 400 years there were 2 ways to become a national hero in my country, the first was to kill neighbours, the second was to be killed by the neighbours
- Hatred against Germans, Ukrainians etc. is part of the Polish tradition
- not to be slaves of history, there was an establishment of the Coalition of different parties which wanted to show solidarity to Ukraine
- 2 sides of the problem – we had 90 000 refugees from Chechnya, half a million from Ukraine and now 200 000 from Syria. On the other hand the current refugee problem has changed the opinion on Ukraine. Today in Poland Ukrainians are not recognized as immigrants.

Jenny Williams:

- People fear refugees – Facts are greatly misrepresented in the media
- Being part of the community which speaks out about facts is very important
- But it is certainly about fear and about how we can change this through education

Rilli Lappalainen:

- People believe that we need to measure what the opinions are...
 - Systematic way to find out what people think e.g. citizen opinion polls about development cooperation
 - Second is elections
- Organizing people for volunteering when they feel urgency / we have many people who want to immediately do something good
- Necessity to build structures for engaging people who want to volunteer.
- Change can really happen if people have a dialog, it is meaningful for the volunteers and for the other side

Helmuth Hartmeyer:

- I am very sceptical about wanting to change people's mind-set through education – if you want to go for this, you go for indoctrination.
- We should create an environment with good conditions and – it is up to the learner whether they want to learn something.
- We need not only educational research but qualitative social research if we want to change people's mind-set
- It is very optimistic to think that we can measure the impact of education after one educational process, project or program of NGOs. We can speak about output or outcome, but the learner is undergoing various influences which make it very hard to measure the impact of the educational activities.
 - Global education should make people fit for the global world.
- We need to be critical in thinking about ranking measurement. Is it even possible to measure impact???

II. How can we use evaluation in order to influence some actors in the country? How can we use this evaluation in a practical way?**Krzysztof Stanowski:**

- The last opportunity to educate the president is when he attends school. Later it is already too late.
- Establishment of the European Endowment for Democracy was also an educational activity. It was very important for European/Global Education.
- Important moment was the establishment of the 1% law (every individual can dedicate 1% of their taxes), which provides 140 million euros a year, we are talking about more than 10 million people. When people are filling out their tax forms, they have to think about whom to give the money to.
- It is the public space where you can present these issues. Politicians and decision makers are consequently influenced by this data and local people.

Jenny Williams:

- Habitat for Humanity is the only NGO focused on shelter and housing. They found it very important that housing became the part of SDGs. Northern Ireland does not have very significant voice in international relations. Therefore they used all their volunteers in 2 specific advocacy campaigns. One on social media, this way they

reached 100 000 people and that allowed them to present their ideas at the assembly, the arguments why housing is essential in fighting poverty. It was a big success for them in a small context, but it really worked, because the volunteers being the voice were also those who engaged with the politicians.

Peter Drál:

- I will criticize the common practice which pushes us to provide evidence, creating reports, and quantifying results. All of us have probably been in a situation where we were polishing the results... Because there is a push for quantification and evidence just to prove where the money is flowing.
- Measuring should not be done only in itself. The numbers are nice but it does not say much. What is really important is if people really respond or if they want to hear. Secondly if it really translates into action.
- I believe in some internal balance. As was the case with migrants in Slovakia, I was waiting for an initiative to appear and finally the situation became unbearable for many people and it did emerge.
- It is good to have a picture from numbers but not only that, to have alternative views on the things which are happening around us -> a bit of an anarchistic approach

Rilli Lappalainen:

- If we think seriously about global citizenship we need to see an impact. But understanding what has been said, I would like to give also some bad examples:
- Finland has often been ranked as first in the PISA statistics and this leads to the opinion, that Finland is the best in Global Education in the world. It can be in the school system, since the curriculum gives a lot of space for the teachers and headmasters – if they are globally thinking people, they have amount of opportunities to use it. On the other hand, there is no support from the government, there is no support for NGOs, and there is wonderful strategy which has never been implemented.
- We need to have everybody on the same page, all actors; researchers, politicians, NGOs, teachers etc. need to be involved, if we believe we can make a change in the world.
- And that is why I think it is difficult to measure, because you cannot measure just one part of the picture.
- Another bad example. The new government has taken not very positive results from the evaluation seriously. Criticism rose against NGOs that NGOs are working with too many countries and topics and instruments etc. Now the damage is really happening, there are 48 % cuts now in budgets and local NGOs do not have money, they are losing all the middle sized NGOs in Finland, the smaller ones – voluntarily based will survive. The only source of funding for NGOs doing local community work was completely stopped. This is an example how one evaluation can destroy years of good and very important work.

I have also some good examples:

- Initiative by the sustainable community in Finland. There is an open source document on SDGs and sustainable development on web. Here examples from families, researchers and factories are available – actually from anyone who would like to share their

ideas on how they want to be more sustainable. It is public and there are reports on regular basis – some of the ministries, parties and the public were involved.

- Another good example is when various actors have agreed on a document which is not legally binding, but promotes global citizenship education – European consensus on global education – jointly agreed with NGOs, researchers, EU politicians; it was launched at the Development Days in Brussels in 2008. This European consensus led to the creation of a national strategy.
- We have to join forces and work on many levels.

Katarina Šrámková, FORS

How can we provide politicians and decision makers with evidence based practice? Can you share some case studies?

Krzysztof Stanowski:

- Personal experience: I used to be NGO leader, used to be a teacher and I never thought about being a political representative.
- “If we want to influence the politicians we need to flood the Ministry of Education with the right people and destroy the barriers between politics and NGOs.”

Rilli Lappalainen

- Create relationships where the Ministry of Education needs the expertise of NGOs, train the people at ministries
- DEMO Finland – parliamentarians involved in Democracy

Peter Drál’

- Play their game – provide them with the evidence they want, don’t play their game – try to bring them to the game by showing them reality.

Jenny Williams

- Try to feed information from the ground and that helps to create relationships

Helmuth Hartmeyer final word:

- Like the anarchistic approach – we know the lyrics in education,
- “We all believe in the statistics we have written by ourselves” – if we want to believe in critical thinking we need to remain critical of ourselves, we need to be open to multi-stakeholder approaches, open to open schools, open universities, open kindergartens, town halls and acknowledge the role of the civil society in its broadest sense (not only the NGOs) also in its ugly face, like e. g. also the Ku Klux Klan is a civil society, the friends of the Austrian Army are also in a civil society, so speaking of civil society we are speaking about very complex actions.
- 5 issues that could help us to critically to think about EDUCATION – self-evaluation:
 1. Is a good environment for learning being created?
 2. Can global citizenship education and global education and all the other educations lead to the awareness of our interconnectedness with the world and global issues? The reasons why Syrians or Lebanese, Turkish flee from refugee camps

have to do with an inequality in the world and not with the Syrian or Turkish or Lebanese problem.

3. Can learning activities create room for visions, alternatives and creativity?
4. We live in a very complex world. How can this complexity be reduced to a necessity for more global justice and allow good education?
5. Can our GCE promote a climate for cooperation and collaboration in schools? The ideal pupil is the one who does not allow the other one to look at what he is writing, because the individual must succeed in a factory or firm, if you were asked to put your hand away and collaborate, this solidarity can be trained and learned.

One final remark, it is great to have this conference, international exchange is decisive and as long as we find our own national, regional causes these are fine. However, if there is a good tradition of international exchange with two capitals like Vienna and Bratislava, which are so close to each other, this is what is efficient.



ROUNDTABLE C:

SHAPING PRIORITIES FOR THE SLOVAK PRESIDENCY: AGENDA FOR REFORMING EU DEMOCRACY FUNDING IN THE EASTERN PARTNERSHIP

The worsening situation in the Eastern Partnership region, Russian aggression and the signing of Association Agreements with Georgia, Moldova and Ukraine, has prompted the EU to start a review of the Eastern Partnership and its instruments. This panel seeks to influence the process of revision with policy recommendations from civil society experts, and to ensure that the revised instruments include more flexible funding to support the actors that exert the most influence over political change or reform processes. It shall also develop concrete recommendations for the Slovak Presidency on better co-ordination between financial assistance and political instruments, and on ensuring greater efficiency of the EU investments in its Eastern Neighbourhood. The question of the V4 transition experience in the context of various EU instruments and policies aimed at the Eastern Partnership, will also be brought to the table.

Moderator:

- **Miriam Lexmann**, International Republican Institute

Speakers:

- **Richard Youngs**, Democracy and Rule of Law Program, Carnegie Europe
- **Katarína Mathernová**, Deputy Director-General for Neighbourhood and Enlargement Negotiations (NEAR), European Commission
- **Nicolas Bouchet**, Center for Security Studies, ETH Zurich
- **Márton Ugródsy**, Institute for Foreign Affairs and Trade, Hungary
- **Věra Řiháčková**, EUROPEUM Institute for European Policy in Prague
- **Karla Wursterová**, Permanent Representation of Slovakia to the EU

Miriam Lexmann:

Introduced the panel and the speakers and pointed out that the roundtable was a unique opportunity for civil society representatives to provide input and feedback for the EU and its current revision of EU Instruments vis-à-vis the Eastern Partnership. It also provided a forum for the upcoming Slovak Presidency to reflect on the various suggestions and translate these into respective priority points to be addressed when its turn comes. Equally the input will be taken into account by the authors of the policy paper on how the EU can better address the challenges of the EaP that will be presented to the Slovak Presidency. This is kindly supported by the International Visegrad Fund.

Richard Youngs:

We are at a fluid moment now where many aspects of EU democracy policies need to be redefined. Next year is going to be very important because of a review specific to the EaP. But there will also be more generic changes to democracy and civil society support. We also have a new democracy and human rights action plan which is quite an interesting initiative. So the way the presidency tries to implement what could be useful instruments for democracy support will be important. We should also have change in financial instruments and by next year we should have an EU global strategy. It's not yet exactly clear what role the democracy and human rights dimension will have in the global strategy.

My impression is that the SDGs could be a useful tool for enhancing democracy support, but it's not yet clear if that will work, because the SDGs do not mention democracy at all. Next year a lot more procedure and measurability will be needed. This explains the basic concept of the challenges for the Slovak presidency. There are additional issues for the EAP: The whole tenor of the EAP review is the geopolitical interest of the EU and the EU is becoming more interested in what countries are including in its geopolitical interest. The crucial question is whether democracy is consistent with geopolitical interest. This is not clear for me. Clearly it makes sense for the EU to strengthen democracy support in Ukraine, Georgia and Moldova as territorial priorities. The challenge there is for EU to carry on its support of democracy and human rights. Critics of the EU believe democracy is good in a very generic sense but that a systematic impact assessment is missing. The link there is more questionable. That is policy calculation in terms of countries that want deeper relations with the EU.

There is a more complicated situation in the countries that are not necessarily moving towards EU accession. It is more likely to see diminished commitment from the EU there. The challenge there would be to maintain a basic commitment to core rights. The principle of differentiation will play a role in strategy building and democracy support. The nature of national priorities will be different and the biggest challenge for Ukraine is its difficulty to achieve decentralization here.

In Georgia there is a problem with the political use of the judicial system. The EU is running generic rule of law programs, but the basic challenge will be to obtain more diplomatic strategy and pressure.

And finally Moldova where the EU is cutting its budget, so the corruption scandals will be the core issue. The degree of support should be prioritized.

So for me these are different national priorities and we need to get a tangible concept for the principle of differentiation.

The final issue in EaP region is conditionality. The EU is talking about a more flexible use of conditionality. For me the key is not to give up on it and not to overload countries with conditions that do not have anything to do with democratic development and political change.

We shouldn't forget that the EU has a new democracy and human right action plan. I think this is something that the presidency will have to get right over the next year. It opens up possibilities for the EU to support political parties as some political parties are losing credibility. This action plan also talks about the EU's engagement with the social movement. The EU tends to be quite good at supporting well organized, professional and advocacy NGOs, but is less good in engaging the broader kind of protest movements which are gaining access to politics. This is an interesting possibility, but mobilization of resources, political will of member states and so on isn't clear.

Finally, V4 debates about contribution should be changed so that V4 countries should not only sell the experience of their own transition, although this is important it is not a crucial aspect of democracy support. It would be better to give CSO core financial support, because sharing transition experience is in my opinion a double edged sword.

Miriam Lexmann:

In Russia the growing challenge in terms of democracy support and post-soviet democracy is system building. How should we address the closing space for democracy support in that part of the world?

Nicolas Bouchet:

I would like to bring up several issues, first would be to cut off national actors from international support and this issue is relevant especially for EaP countries. The next is the issue of closing space so national government, the EU and civil society get together more that happens now to address these issues. We should all make our own contribution, not only on an EU level but also on a country level, in terms of civil society pushing governments to address closing space issues in practical terms. Civil society, EU actors and national governments need to gather together not only bilaterally, but also on a more multinational level to defend principles and to receive and offer support to civil society actors. Civil society should be able to receive support.

A valid point is that people need to establish principles for the transnational support of "political" actors. Democratic actors need to move forward not only criticize the closing space but actually put forward an agenda. The other thing that needs to be addressed more is the number of actors involved. There should be national, EU, national CS actors and so on working in this field. I am not convinced that all these organisations are doing a good enough job in coordinating their work and collaborating with each other. They need to go further to formalize platforms, to establish better coordination, a better working approach and better communication between actors. The EU actors could do better nationally and also when engaging non-EU actors. Ukraine needs to be addressed more seriously.

Regarding the V4 civil society, a bigger role could be played in terms of lobbying. Specifically CSO and NGO should be more active in lobbying for greater support from the EU. I agree with Richard on the conditionality issue. Drawing from last year's experience, conditionality is not working. It is important for civil society to lobby the respective EU governments to make sure there is conditionality in relationships with the EaP countries."

In terms of Russia, there is currently a great dilemma. The EaP cannot be subordinated by Russian policy or the other way around. It is difficult to envision a proper strategy for the EaP without the EU developing a strategy for engaging with Russia, also in terms of influence on its neighbourhood countries. This has not yet been implemented into EU global strategy and it is not possible to implement this without having a proper strategy on Russia.

Miriam Lexmann:

We see conditionality now in terms of a changing relationship with Russia and the respective EaP countries. The space is very diverse and we are observing contradictory trends. Where do we stand: practically and in the larger concept? Are we well-enough equipped to address these challenges?

Katarína Mathernová:

We hope for a more lasting engagement with civil society. I would like to pick up on a few things from previous speeches. All the comments are well taken. The EU is looking for its own angle regarding EaP. I don't think it is necessarily going against the interests of civil society. Especially with partners it's important to support civil society through watchdogging, monitoring reforms, contributing to democracy etc. In its funding 2014-2017, the EU is almost doubling support for civil society. It could be argued however that this is still not enough compared to e.g. infrastructure spending. Recent turmoil in the region is reinforcement of the fact that we need to work smarter and better with civil society. We need them to hold governments accountable and this is transition experience. To have sustainable democratic dialogue you need a civil society. This is a basic premise and it is going to be key component.

E.g. Azerbaijan is not showing the desire for broader engagement with EU. This is going to be a much harder balance to strike and it maybe tilting to one direction. The views of the 28 are often a cacophony, but strong blocks exist that will never give up on democracy and civil society support. I expect there is going to be a stronger emphasis on closer partners.

But in our portfolio we have also Russia and right now there is exclusively civil society support there. There has been a genuine attempt to at least help a little bit expand into the closing space, but the EU cannot do it alone. It is trying to come up with an instrument. There is a new action plan on civil society engagement in EaP countries. The European endowment for democracy is also getting increased funding from the EU this is because we have realised that smaller type of funding is not one of our strengths. One other thing that the EU traditionally carries out is independent media support. There is an open program and you may be familiar with the EED's analysis of the impact of anti-EU propaganda in the Russian speaking space. We are going to support a news organization building that counter balance. It's never enough, but it's a genuine attempt to move forward. There are different dynamics and different problems but the general notion is it's of key EU interest to promote democracy and help build stronger civil society.

I also wanted to mention the tool TAIEX. Statistics for last five years show there has not been a single project led by V4 countries. This is a great place to talk, research, network and build alliances for tapping into some of these resources. It is not only about exporting 20 years of experience. Core funding for buddying organizations may do a lot in the region. There are still number of exchanges that can be supported. V4 or the Baltics can relate to the reality in Moldova or Armenia much better now. We have established a centre of expertise established on various issues, one of them is on civil society as well. Good ideas can be concentrated there.

Miriam Lexmann:

We need to be more creative in translating policies into instruments. The transition potential of the new member states is something the EU should be able to employ more effectively in its instruments.

Věra Řiháčková:

TAIEX instrument requests also come from the EaP countries themselves. Ukraine, for example, asked the Commission to send Polish experts from the instrument to support their education system reform, because their background and experience was similar. TAIEX only works on demand.

Implementation of association agreements needs the expertise from new member countries but the influx of the expertise should be natural and driven by the EaP countries. From the angle of the civil society, the reform of neighbourhood policy is important. Differentiation is happening on the ground and tools should catch up with the development. The EU acknowledges this development is a step in the right direction, we also need to focus on the group of countries that do not have an association agreement. We should use this opportunity to start modernization processes in Belarus as well.

There was a note on the link between sustainability and partnership this morning. At this point another term – irreversibility, comes to mind which, is another side of the equation. We need partnership in order to make the reform processes not only sustainable but also irreversible. We need to include civil societies, but also other important stakeholders within EaP societies that can hold the governments accountable. For achieving this two things, in my opinion are important: We need conditionality which would allow inclusiveness, and which can be more flexible in some policy fields and stricter in others. For example, Belarus is taking part in the Bologna process right now and is starting the implementation of the road map. We are looking for ways to include local CSO in the process, and the EU and the member states need to push the government gradually in order to allow for this.

The second thing is funding: according to my study, out of the ENPI 2012 budget line for Eastern neighbourhood, only 4 percent of relevant funding was channelled to the local civil society in EaP countries and 9 percent via EU CSOs meanwhile, 40 percent was channelled via projects implemented by consultancies, based mostly in the old EU member states. A very small proportion of money from these projects goes to the local CSO. Another 27 percent went to international organizations which implement projects in EaP, which is a large proportion. Out of this funding, a substantial proportion is spent on the administrative costs of the IOs. So I would recommend a couple of steps, which are feasible based on the current legal basis guiding EU external action instruments: 1) to enforce mandatory re-granting to local CSOs and other actors from large EU-funded projects implemented by international organization and consultancies 2) to cap the administrative cost that can be incurred by the international organizations within EU grants 3) to make sure the major EU-funded projects fit the needs of the local context, and, where possible, to introduce local CSO representatives into the steering committees supervising the projects where the EU is also represented.

Miriam Lexman:

The role of businesses and the private sector in democracy support is another area the EU should be able to explore more in depth to increase the efficiency of its aid.

Márton Ugródsy:

SMEs are important for democratic transition. The whole package of transition includes SME and the business climate. Without them advantages would be lost. This is not fulfilled in EaP countries. There are several challenges: These companies do not have access to funding. They have a limited knowledge base and limited access to local and international markets. It is a very important matter to prepare economies for free trade with the EU. We need to make Moldovan SMEs competitive so that it makes sense for them to be part of the EU. We also need to talk about the necessity of entrepreneurship. A relatively high percentage of companies in Moldova are SME, but they only count for 3 % of GDP and 2 % of employment. There are 2 major business models, operated by the US and the EU. The American way is to provide funding; an initial capital of 100 million USD. They have invested in companies in the region, not simply provided loans. They expect a return on their investment. A special hedge fund has been created and invested in Moldova and Ukraine. This was not as institutionalized as the EU model. USAID put special emphasis on export promotion, dealing with economic leadership and enforcement. You do not only have to deal with money side, but also the knowledge side of the problems. They not only have seminars, meetings, networking opportunities and so on, but they also put American managers in place. And when we look at the EU framework, the flagship initiative of the EaP, it is important to know that there will be significant convergence of EU regulations. Sooner or later the countries have to know how to cope with situation. The EU needs to improve access to funding. The EU supports a very well structured approach and they have institutions to provide networking opportunities for EaP and the EU. The EU also runs advisory services and there is also an SME facility which provides funding. At the Riga summit 3 pillars were identified: policy reform held by the OECD as well, reinforcing SME finance facility and investment. This is the direction to move in.

As regards priorities, Georgia, Moldova and Ukraine remain the most important partners. The EU has to deal with DCFTA adoption. As mentioned already in 2013 and we should really look into how EaP markets could get the most from access to EU markets. Even if V4 transition is not fully transferable right now, EaP countries can still learn from the mistakes of the V4 countries during the transition process.

Miriam Lexmann:

Slovakia will take up the EU Presidency in the summer of 2016. Where do we stand with Slovak presidency priorities?

Karla Wursterová:

We already have the trio program to be adopted. It's also about priorities for the trio- the Netherlands, Slovakia, and Malta. First of all there's the neighbourhood policy. The credibility of the enlargement process and the effectivity of the western Balkan region towards the EU remains strategically important. Migration plays an important role not only in the western Balkans, and North Africa, but even in Armenia. We will not only follow the implementation of the EU agenda on migration, but also Council conclusions from April, June and October 2015. You have probably heard about the last Conference on the Eastern Mediterranean and Western Balkan route from 2015. Speaking about EAP priorities, we will focus on EU global strategy, security policy, review of the EU neighbourhood policy and a midterm review of the European neighbourhood instrument. When I mentioned migration Katarina underlined that we are working with 2 flexible instruments- the regional fund of Syria and a second to be signed dur-

ing the Valetta summit in November, a so called Emergency trust fund. These will be financial resources from existing financial instruments. We will need to increase finance for migration. The principles promoted by the Slovak, Dutch and Maltese presidency will be differentiation, coherent application of EU policies and to building stronger partnership. Agenda 2030 not only focuses on LDCs such as African and Asian countries, but also on developed countries. We have our own goals and we will have to fulfil them not only on an international level, but also on national level. I hope the Slovak government will start soon with concrete talks and that they will submit a national program for agenda 2030 focusing also on LDCs, EaP western Balkans, and more multilateral cooperation- by involving not only EU, but also UN and NATO.

Speaking of technical issues and about cooperation on the V4 level, divisional play for Ukraine was decided and they started direct and open-minded dialogue in Ukraine. Of course there are challenges in each EaP country as Richard mentioned.

On the EU level policy coherence for development will be important. The council conclusion for policy coherence for development will be adopted. We would like to involve not only civil society but also stakeholders, private and public and really to talk to them. More focus on this will be needed. We also need strong talks with the EC on how to involve NGOs in the instruments of EC, first of all in global education. NGOs and CSO are not eligible for this cause. We hope we will be able to change this policy, because public awareness is needed more in newer EU countries than in core. A coordinated policy is needed. There should be interaction between internal and external policies as was also mentioned by high representatives of the EC.

Last, but not least on the topic of instruments. We will have to evaluate policies and tools, the involvement of all EU member countries, also newly introduced approaches such as joint programming and delegated cooperation.

My recommendation is to have better coordination and coherence. We could organize briefings with CSO, and other stakeholders and get civil society to communicate with member states.

Discussion:

Q: You have mentioned that it is important to work with CSO because they will help hold governments accountable. I think this is no longer accurate. Governments have learned how to avoid accountability. Membership can also be a tool for avoiding in some areas. It's time to rethink the balance with a focus on political parties as well as political parties which part of the civil society.

Q: I would like to talk about the transfer of know-how and the integration process in different areas and the share of the organization companies from

Central Europe or new members to help EaP and the western Balkans. Consultancies companies hire staff from our states and employ them, but funding only goes to old member states. The reason in Slovakia at least, is that there are only a few organizations that fulfil the references criteria. We are trying to work on this, to build alliances, and to also search for partners from the old member countries. But when we come to them with a proposal, they tell us that it's too late. When should we enter the process? The feedback is that certain projects are created with someone specific in mind. When is the right time to be successful in this?

Q: Azerbaijan was not at the Riga summit. Political prisoners from Belarus were present and not enough time was devoted to the issue of the Azerbaijan. The issue should be put into the spotlight. Does the EU Commission think that by funding civil society forums they can subcontract someone else to deal with this issue?

Katarína Mathernová:

I agree that some parts of the role of NGOs are outdated. However, we should not underestimate the strength of civil society in the broader sense, e.g. consumer rights and watchdogs still play a key role. They may not be as strong as in 90s but it's still current, e.g. Majdan.

I am less optimistic when it comes to political party support. The EU is not able to deal with this problem, because decision-making is a conglomerate of the 28 and the decision making mechanism is extremely slow. They should rather leave it to national political foundations. The question is whether funds should be created and be given to someone to administrate. But again the political party world represents numerous challenges, like with whom to work etc.

On the question about criteria for references, financing is 0 sum game. Old ones only give up as much as they are pushed to give up. Maybe new members are not that good at networking, supporting and looking for actors in the machinery. When it comes to civil society use and outreach to the EaP countries, they need to get together and formulate concrete proposals, then we can have a discussion. Networking and being active is the key.

Close partners will be under the biggest scrutiny. Civil society in Azerbaijan is going to be on the agenda. The views of the 28 will interfere greatly.

Miriam Lexmann:

Support to political parties shall always be provided on a horizontal level i.e. to all parties that embrace democratic values or at least in principal. We need to be careful not to focus only on governmental parties. The role of the opposition is vital. The best partner for the EU to implement support to political parties would be ENoP (European Network of Political Foundations). They cover all political spectrums and so can guarantee a horizontal approach as well as long standing experience in this field of democracy support.

Karla Wursterová:

We have to focus on networking. The involvement of our embassies in partner countries is also important. Countries should implement its development and technical assistance via embassies in a direct way. We need a change of approach in the embassies, direct dialogue with NGOs and CSO, their help with lobbying and a change of attitude and diplomacy policy in partner countries.

Věra Řiháčková:

The EU is currently employing a clumsy approach regarding Azerbaijan. We were asked to keep a low profile at the moment. It is all about balancing personal faith in somebody with approach. In practice, people face jail etc. you have to balance the policy approach. Genuine civil society representatives have had to leave the country. We are in touch with them. We need to identify individual people rather than organizations to work with in Azerbaijan.

It is vicious circle generating demand. People lobby at the formulation stage of the topic, in some cases competition is ruled out from the beginning. We have to go via recipient countries to identify added value now in order to enter the circle.



THE SLOVAK NGDO PLATFORM ROUNDTABLE D:

V4 COUNTRIES AND THE EASTERN PARTNERSHIP: HOW TO ENSURE COHERENCE?

The Visegrad countries, due to their history, geopolitical location and current dynamics, share political, socioeconomic and security interests with the Eastern Partnership countries, especially given the current situation in Ukraine. Supporting the EaP region in becoming a stable and reliable partner for the EU is an important priority for the V4 governments, which has made them leaders in EU policy, including development cooperation, towards the EaP countries.

Despite the clear political objective of supporting the social and economic development of the EaP countries, not all V4 policies contribute to this goal. A research study conducted by experts from all V4 countries exposes and analyses cases of incoherence between development objectives for the EaP countries and policy areas such as energy and investment. How can the economic interests of the V4 countries be reconciled with the development objectives of the EaP region?

Moderator:

- **Peter Brezáni**, Research Centre of the Slovak Foreign Policy Association

Speakers:

- **Jakub Stepien**, Krakow University of Economics
- **Zsuzsanna Végh**, Centre for EU Enlargement Studies, Central European University
- **Yevhen Hlibovytsky**, pro.mova expert company, Nestor Group

Peter Brezáni:

- Today we are going to discuss the results of the project led by Grupa Zagranica.
- Jakub Stepien (JS) will present the project outputs and recommendations.

- Zsuzsana Vegh (ZV) will present examples of incoherence.
- Yevhen Hlibovytsky (YH) will discuss the situation on the ground and will give us recommendations on how to improve this.

Jakub Stepien:

General remarks on the project: policy coherence in support of EaP countries. The idea was to build synergies between the V4 countries and EaP countries. The project is research based to analyse the current situation and find space and ideas to ensure policy coherence. The general way of thinking about development assistance or cooperation is that development assistance alone cannot bring permanent social-economic change and it should be coordinated with other policy ideas to ensure lasting change. Four case studies that we've got in the research project illustrate coherence or incoherence between development cooperation and other policy areas, such as energy, migration policy, etc.

We've got four partners:

- CZ – FoRS – links among V4 countries and Azerbaijan in the energy sector.
- Hungarian case study – run by HAND – the perception of development assistance among recipients towards EaP
- Slovak case – Slovak NGDO Platform – coherence between Slovakia's energy and development policy towards Ukraine
- Polish case study – run by Grupa Zagranica – practical implementation of development cooperation act and foreign direct investment in Moldova, e.g. promotion of trade, lack of systemic support and tools

There have been two main findings:

1. PCD is a serious issue in all four cases, little political importance, differentiation among countries
2. Although coordination bodies in some of the countries exist, there is a lack of development / management of this kind of institution

The main idea behind the project was to raise awareness at governmental level.

Zsuzsanna Végh:

It's going to be an advocacy tool in the hand of the NGDO Platform. Last year was important for Hungarian international development policy. It took us 10 years until we got a legislative framework for the policy. The case study focused partly on how the PCD is present in legislation on kin state policy. This is directed towards Hungarian minorities living in neighbouring countries

Ukraine, Transcarpatia – there are around 150 000 Hungarians (according to a more than 10 years old census) 2,3% of the total population.

When looking at how PCD appears in legal frameworks and strategies – PCD as such is incoherent there. It is not clear what is meant by PCD. It is interpreted differently in the strategy.

Whether development policy takes other foreign policy goals into consideration

Or development policy takes partner countries' priorities into account

An inter-governmental committee was re-established to work on PCD with the representatives of other ministries. But from the strategy it is not clear what we mean by PCD.

Development department and representative of kin state policy – there is no representative on the development coordination committee.

There is a committee for kin state policy, but there is no representative from the development cooperation department.

The two policies are interlinked. What is reported as ODA is kin state policy.

There are not talking to each other directly.

Three entry points

- Direct support provided by the institutions of the kin state policy
- Education of this minority
- Looking at the naturalisation process granting citizenships for people not residing in Hungary

Local priorities were incorporated into the kin state policy. This works within a unified framework for all the countries, so it did not take the specific needs of partners in Ukraine into account. It focused on education and culture. Social projects would be very much needed and this does not appear in the policy.

We had problems accessing data. There was no transparent data, we don't know how many citizenships were granted. Fraud, falsifying documents... The impact should be assessed better.

We see this as an advocacy opportunity for the NDGO Platform. We drafted some recommendations for the MFA – define what we mean by PCD, try to find synergies between the local development plans, involve each other and establish transparency around the ODA data. The current system is not transparent, we cannot identify projects, propose synergies implemented by MFA and kin state policy. Need to have an overall assessment for education.

Peter Bzrenáni:

It is mutually beneficial for Slovakia as could be seen in the Slovak case study

Yevhen Hlibovytsky:

There is a strange feeling on the Ukrainian side that there are more procedural actions in V4 / EU than results. I would like to zoom out.

One thing that strikes me – what is the mission of the V4 when you look at these cases. Political, social and economic interests- not sure

History and geopolitical location – this is true

EU, NATO – V4 countries had the same aims to join.

With regard to the current situation – we see a difference in political objectives

In those countries there might be different perception of what the state is, what democracy is and how institutions should function.

Examples:

Two years ago – in the state of war with Russia, Ukraine was not sure how to behave in the energy sector regards Slovakia and Hungary. It made efforts in discussions on the EU level – to reconstruct the gas supply market – this was a question of survival for Ukraine

Reputation was being formed at this stage. If you don't know the answer...

We live in a specific environment in Ukraine. The assumption in Ukraine is that the state is toxic. V4 countries have persuaded themselves too early that their states are not toxic. Civil society, private foundations, broad national movements in each country would represent the values much better than the states do.

In our case the state is hopelessly toxic.

There is probably a slightly different situation in Poland than in other countries. This is a maturing process.

Secondly, civil society actors are not sure whether EaP is an instrument. But it is better than having it abolished without replacement. There are different situations in Moldova, Belarus, Caucasus, we have issues in Armenia, in Georgia...

There are more criteria regarding disparity than similarity.

The question is whether V4 countries can have a common approach, whether they have something to offer.

Untapped resource – all of the V4 countries have experienced a loss of security.

This is a voice that could be very useful. But other policy structures would have to meet and they are not meeting at the moment. Close to freezing point in PL – UA relations.

3 points:

- Think of what can be done to secure the legacy of Visegrad
- Review the EaP as a concept. Maybe we should think about arriving with a new instrument.

Turkey is part of the issue.

- Consider that there has been a very significant shift in Ukraine – like when children have guardians at a very early age but then they have to mature very early – this is what is going on at the political level in Ukraine

Generally it's Ukraine's problem. Ukraine has a great soft power against Russia. Russians claimed that Ukrainians don't exist. Ukraine can harm Russia's industry significantly. Transistria, Moldova is developing its own policy towards Belarus. Whatever internal changes happen in Ukraine, it is being watched by all the former Soviet countries. They know that windows of opportunity will open elsewhere.

Tighter V4 cooperation with Kiev could strengthen their position in the EU. I am not optimistic right now. We are probably in a situation of a roll back with Visegrad. It is unsure if anyone else (e.g. the Baltics) could enhance Ukraine inside the EU.

Jakub Stepień:

Our countries are from the post-Soviet era. We've got some common socio-economic and political problems. In recent years the Polish government has withdrawn from doing politics in the V4 initiative (let's say in the last 5 years). It was connected mainly because of the relations between Poland and Germany. This attitude will probably be changed now with the new government. The main opposition party will be probably rule on their own. The Visegrad initiative is more important than the current ruling party. There is a big chance for change in this respect. Orban said something like Poland should take the initiative in this group and this is a serious issue in Poland. Even the Polish government isn't coherent regards this issue. The opposition party will probably win the elections. They hold a "realpolitik" point of view.

Zsuzsanna Végh:

Yevhen has very correctly commented on the situation (in the past 2 years) it would be good to provide a clear role for the partners in the EU on how they view possible assistance. This was a missed opportunity for V4, but also for certain countries in particular. The Hungarian government made very unfortunate remarks regarding the Hungarian minority in Ukraine and called for autonomy. This was very unfortunate timing. Yevhen highlighted that the state is toxic. We very quickly started to promote democracy when democracy was not yet consoli-

dated in our countries. Civil society can contribute to maintaining the image of V4 countries as democracy promoters. This is what IVF does both in V4 and in the EaP countries and what can help to maintain this image.

The revival of V4 – governments could be more in favour of this.

Jakub Stepien:

V4 is considered as a good tool that could be used for initiatives such as PCD, or as political leverage towards the EU. Intermarin is a bigger geo-political concept. It would be interesting as one of the options for security. There is a chance that this idea will flourish, but now it's only in the beginnings. In the current migration crisis V4 cooperation is considered successful.

Zsuzsanna Végh:

As part of one project in the region, we asked different stakeholders from the political elite what they saw as the major obstacle in the V4 cooperation. What came out was that Poland is trying to find a medium power role.

Jakub Stepien:

In Orban's speech as was understood the balance of power in the region could positively change which could give the V4 countries more space for political manoeuvre compared to other EU countries.

PCD is quite a new issue. There has not been much research on the EU level. How difficult it is for EU leaders to see this.

KAPUSCINSKI

DEVELOPMENT

LECTURES



BEYOND CROWDFUNDING: THE REAL POWER OF THE CROWD IN DEVELOPMENT

MARI KURAISHI

GlobalGiving

Mari Kuraishi, president and co-founder of the GlobalGiving.org, was the top speaker at the international Development and Democracy conference held on October 19th 2015 in Bratislava, Slovakia. Mari dedicated her lecture to crowdfunding in the development world and shared her personal experience in running one of the first crowdfunding websites ever.

When Mari and her co-founder Denis Whittle established GlobalGiving in 2002, crowdfunding didn't really exist then. Previously they worked for the World Bank and as Mari says, they saw gaps in the way the World Bank was dealing with international development. They realized that the World Bank works in a top-down fashion when it comes to development. "It was a model where experts arrived in countries, figured out, designed and planned what needed to be done, issued a check and left. This may work in infrastructure projects, but public goods got more complex to deliver and this model turned out to be insufficient," Mari shared her experience. The problem with official multilateral aid was that resources tended to flow to organizations that were already established, could handle large amounts of money, and perhaps had a good relationship with some of their governments. "However, if we want to see innovations in the field of international development, we need to make it possible for smaller flows of money to go to smaller untested organizations on the ground," explained Mari.

In the beginning they greatly struggled to describe model of crowdfunding to people. They called themselves the e-bay of philanthropy, which was great analogy and this explained the core idea in the beginning. Another issue that GlobalGiving is trying to address is to change the assumption that people in developing countries cannot find a solution for their own problems. As Mari pointed out "there is clear research these days that proves this is not the case at all. If success does not happen from the poor countries, it's because when you face

scarcity in some key fields including finance, the cost of air goes up dramatically as well as the incidence of air. We only get better if we have room to practice and room to fail. And the poor do not have room to fail. When they make a mistake it is potentially life-threatening.” So Mari and Denis created GlobalGiving to give motivated individuals a chance.

Another issue international development struggles with, is that one solution very seldom fits all problems. “In development you are supposed to help the most vulnerable communities. But every community is different and requires its own solution. So our model at GlobalGiving is to create scale by tapping into the very heart of local solutions that emerge and find a way for all of us to be engaged.” GlobalGiving as an organization, is dedicated to the notion of how to do development. Values are very important. The first of these is to always be always open. “We believe that great ideas can come from anyone, any place at any time” said Mari. GlobalGiving also tries to ensure that the people they work with in the development world will have great experience, because they rarely get the best service or the best product. The next one is the “listen, act, learn” cycle, which is reflected also on GlobalGiving.org. The site has changed since 2002, and it has done so continuously and Mari and her co-workers are always trying to improve it according to this rule. Finally, the last rule is to never settle, because their main goal is to change how development is carried out.

Mari summarized the success of the GlobalGiving. Since 2002 they have sent just under 200 million dollars from half a million donors to over 13 thousand projects in 165 countries. However, Mari sticks to her rule to never settle and points out “we need to do more if we are going to accomplish our goal of doing development differently.”

Apart from trying to get people to donate more, including working with leading behavioral economists and psychologists, GlobalGiving actually wants every single organization to generate better results. “We don’t just pick the best ones, because we would be shutting the door on creativity,” said Mari during her lecture. GlobalGiving delivers tools, information and data for organizations to improve. In addition to that, they also try to deliver incentives. This generates a points system for the organization which in turn translates into how visibly they are displayed on GlobalGiving.org. This part is not obvious to the donor but the result of us using that ranking mechanism to figure out which organization should show up higher on our page means that someone who is browsing the site—say, for projects in India, or projects supporting women—they will automatically see the organizations that are the most transparent and engaged in the highest impact behaviours.

“I am an accidental social entrepreneur,” said Mari. Then she delivered her educational and working background. She studied sovietology and Russian history. When the Soviet Union disintegrated she took a job at World Bank. “So being a social entrepreneur was not my original goal. But I have been given a great gift to do what I believe in” noted Mari.

At the end of her lecture Mari made some last remarks about crowdfunding itself. According to Mari “crowdfunding is an interesting mix of joint venturing and innovation. It is not charity. People are not expecting money out of it. People get engaged in crowdfunding for fun. Crowdfunding is offering us a new potential if the non-profit world and philanthropy can leverage the power that crowdfunding is creating, we can become a more generous world.”

ACADEMIC

PAPERS



MEDIÁLNE ŠKOLENIE V TERÉNE SMEROM K ZODPOVEDNÉMU INFORMOVANIU O ROZVOJI

**Božena Markovič Baluchová,
Simona Šafaříková, Lenka Dušková**

Abstract

The year 2015 is the European year for development and it represents a significant milestone in the field of development cooperation. It was therefore necessary to seek new forms of information dissemination and awareness raising of official development assistance (ODA) of the Czech Republic and EU. For this reason, the Department of Development Studies of Palacky University in Olomouc decided to create a project of field trip: “Development Cooperation in practice – field trip to Moldova”, which gave 15 students an opportunity to visit Moldova in September 2015 and look at the Czech and EU development cooperation projects. One of the outputs of the project aimed to increase skills in media education and public awareness of development issues. Thanks to pre-departure media training the students were able to inform about development issues in Moldova in more sensitive and ethical way (using the Code of Conduct on images and messages). Another output of the project was to achieve a multiplier effect of the field trip through public presentations – especially educational events at Czech schools – led directly by participants of the field trip. Palacky university students could use in practise newly gained skills – as a result of media education and global development education.

Key words: development assistance, code of conduct on images and messages, media training, global development education, field trip to Moldova, European Year for Development

ÚVOD

Rok 2015 bol vyhlásený za Európsky rok rozvoja a predstavoval významný míľnik v oblasti rozvojovej spolupráce. Bolo preto potrebné hľadať nové formy šírenia informácií a osvetu o zahraničnej rozvojovej spolupráci Českej republiky (ZRS ČR), rozvojovej spolupráci Európskej únie (RS EÚ), ako aj vytvoriť atraktívnejšie formy práce s verejnosťou. Z tohto dôvodu sa Katedra rozvojových štúdií (KRS) Prírodovedeckej fakulty Univerzity Palackého v Olomouci rozhodla vytvoriť projekt odbornej terénnej exkurzie: *Rozvojová spolupráce v praxi – Exkurze do Moldav-*

ska¹, vďaka ktorému mali 15 študenti z KRS možnosť navštíviť Moldavsko a pozrieť sa na české aj úničné projekty rozvojovej spolupráce zblízka. Jednou z aktivít projektu bola aj produkcia mediálnych výstupov a verejných prezentácií z exkurzie, ktorej predchádzala predvýjazdová mediálna príprava.

Mediá poskytujú človeku množstvo informácií, no na druhej strane prinášajú aj negatívne, manipulatívne vplyvy, ktoré môžu ohroziť slobodu človeka. Aby mohli ľudia využívať médiá na zmysluplnú a efektívnu komunikáciu, je potrebné, aby ovládali okrem komunikačných kompetencií aj kompetencie mediálne. Obsah mediálnej výchovy ako prierezovej témy je tak čoraz častejšie integrovaný do obsahu vzdelávacích oblastí a vyučovacích predmetov od základných až po vysoké školy.

Neustále rozvíjanie kritického myslenia nie je len cieľom globálneho rozvojového vzdelávania, ale aj mediálnej výchovy. Základy žurnalistickej práce si preto osvojili 15 študenti medzinárodných rozvojových štúdií (MRS) ešte pred výjazdom na exkurziu do Moldavska v septembri 2015 a princípy etického kódexu o zhotovovaní obrazov a podávania správ z rozvojových krajín aktívne dodržiavali pri zhotovovaní fotografií, kladení otázok na realizátorov či prijímateľov ZRS ČR, či spracovaní novinárskych prejavov z exkurzie.

1. INFORMOVANIE VEREJNOSTI O ROZVOJI CEZ MASOVÉ MÉDIÁ

Masmédiá, ako prostriedok na získanie informácií o rôznych skupinách ľudí (nehľadiac na ich geografickú vzdialenosť), môžu chybou vo výklade, či už chcenou alebo nechcenou, spôsobiť nepochopenie reality divákovi. Ku vznikom a podpore stereotypov totiž prispieva neznalosť alebo nedostatočná informovanosť, ktorá je často spôsobená získaním skreslených informácií: či už z médií alebo iných zdrojov. Walter Lippman dokonca tvrdil, že „ľudia nekonajú podľa toho, čo sa udialo, ale podľa toho, čo si na základe obrazov, ktoré im predkladá tlač, myslia, že sa stalo.“² Počas mediálneho školenia pre študentov MRS bez predošlej novinárskej skúsenosti bolo dôležité poukázať na tento fakt a postupovať pri konzultáciách možného informovania o rozvoji tak, aby sami neskľzli ku skresleným a neetickým správam z navštívenej krajiny v rámci exkurzie.

1.1 Klasické verus nové médiá

Novinársky prejav je základnou stavebnou zložkou žurnalistického celku, zároveň je výsledkom individuálnej novinárskej činnosti – keďže jeho autorom je novinár, vychádzajúci zo žurnalistických faktov. Obsah prejavu determinuje formu a tvoria ho informácie o konkrétnych udalostiach. Musí obsahovať vecnú stránku udalosti, javu (súhrn faktov), autorský zámer (najmä ak ide o analytický publicistický, nie spravodajský text – je dôležitý autorov postoj: komentár, odporúčania či závery), a kontext (teda súvislosti v rámci udalosti – hľadanie príčin, dôsledkov, charakteristika vnútorných vzťahov, možné alternatívy riešenia problému)³.

Aby sa jav stal podnetom pre vznik správy, musí spĺňať kritériá, označované ako „spravodajská hodnota“. Podľa McQuaila možno v anglosaskej žurnalistike kritériá spravodajskej

1 Rozvojová spolupráca v praxi – Exkurzie do Moldavska, 2015 (Katedra rozvojových štúdií PĚF UP v Olomouci: Projektový dokument)

2 Sedláková, 2008, s. 149

3 Baluchová, 2014, s. 74-75

hodnoty zoradiť takto: rozmer udalosti, blízkosť, jasnosť (zreteľnosť), ohraničená dĺžka trvania, závažnosť, súzvučnosť, personifikácia, negatívnosť, významovosť, dramatickosť a akčnosť⁴.

Popri klasických médiách sú tu aj „nové médiá“⁵, vychádzajúce zo špecifik nových, t.j. digitálnych technológií, ktoré sa využívajú na spracovanie, výrobu, uchovávanie a vysielanie medializovaných obsahov a ktoré, v porovnaní s technológiami „klasických“ masových médií – umožňujú podstatne výraznejšie a systémovjšie využitie prirodzených interaktívnych vlastností ľudského zmyslového vnímania a chápania. Práve rozvoji dobrovoľníci, študenti iných odborov ako žurnalistiky, sa vo svojich verejných výstupoch orientujú na nové médiá a blogy.

Hamilton et al.⁶ charakterizuje stereotypizáciu ako „kognitívny mechanizmus, ktorý formuje názory a postoje voči určitým skupinám.“ Stereotypy sú zamerané na rôzne aspekty, typické sú stereotypy založené na etnicite, veku, pohlaví, sexuálnej orientácii, národnosti, náboženskom vierovyznaní, zamestnaní alebo sociálnej triede. S marketingom chudoby ako jedným zo spôsobov mimovládnych organizácií – ako masovo informovať o svojich aktivitách a získať pre svoju činnosť financie (fundraising) sa možno stretnúť aj v Európe, napríklad v programovej krajine oficiálnej rozvojovej pomoci (ODA) SR a ČR – v Moldavsku.

1.2 Pochopiť spôsoby mediálnej produkcie mimovládnyimi organizáciami

Organizácie zhotovujú textový a obrazovo-zvukový materiál (fotografie, audio-nahrávky, video-záznamy, filmy) z niekoľkých dôvodov – za účelom: informovania (vzdelávanie a zvyšovanie povedomia cez masovo-komunikačné prostriedky); pokusu o predaj svojho produktu či služby, resp. získania peňazí (marketing, PR, fundraising); presvedčania (advokácia, politika); alebo vyúčtovania dotácie či grantového projektu (report).⁷ Väčšina týchto informačných, marketingových či fundraisingových aktivít sa dnes odohráva vo virtuálnom priestore – online cez internet.

Fundraising definuje Boukal ako „systematické získavanie finančných i nefinančných zdrojov, ktoré nezisková organizácia potrebuje k realizácii svojho poslania“⁸. Je často označovaný za marketing neziskových organizácií. Mnoho predstaviteľov neziskových organizácií sa však pojmu marketing úplne vyhýba pre jeho často negatívny význam. „Hoci základné myšlienkové východiská i konkrétne realizácie marketingových aktivít sú v neziskovom sektore iné ako v sektore podnikateľskom, v základných rysoch sa predsa len môžu zhodovať.“⁹

Potom je tu však kontroverzný a stále aktuálny pojem: marketing chudoby¹⁰, ktorý opisuje zneužívanie obrazových alebo písaných materiálov ľudí, zachytených v nedôstojných podmienkach extrémnej chudoby, a ktorý pôsobí na emócie čitateľa či diváka za účelom získania jeho sympatií, zvýšenia sledovanosti či čítanosti média, fundraisingu alebo vlastnému zviditeľneniu. Typickým príkladom marketingu chudoby je obraz hladujúceho vychudnutého dieťaťa s natiahnutou rukou k fotografovi a s nešťastným výrazom, typicky v čiernobielom prevedení, ktoré fotografii umelo pridáva na dramatickosť.

4 McQuail, 2009, s. 302

5 Valček, 2011, s. 201

6 Hamilton et al., 1990, s. 36

7 Baluchová, 2014, s. 83

8 Boukal, 2013, s. 32

9 Bačuvčík, 2011, s. 9

10 Marketing chudoby sa v médiách označuje aj jako rozvojová pornografia, pornografia chudoby.

1.2.1 Časté využívanie marketingu chudoby v mediálnych produktoch

Organizácií a kampaní, ktoré marketing chudoby stále používajú, je veľa. Argumenty, obhajujúce túto fundraisingovú praktiku, je možné rozdeliť do niekoľkých kategórií. V manuáli Canadian Council for International Cooperation (CCIC)¹¹ sú rozdelené nasledovne: pritiahnutie pozornosti k skutočným potrebám; budovanie povedomia a mobilizácia k aktivite; účinnosť pomoci.

Často sa vychádza napríklad z tvrdenia, že „ľudia z krajín globálneho severu majú morálnu povinnosť, zodpovednosť starať sa o ľudí, trpiacich inde vo svete.“¹² Aby sa ľudia dozvedeli o problémoch rozvojového sveta, musí byť ich pozornosť pripútaná niečím šokujúcim, čo v nich vyvolá potrebu finančne prispieť a o problematiku sa ďalej zaujímať. Takisto sa používa argument, že organizácie majú morálnu povinnosť, zodpovednosť byť efektívne a využívať teda stratégie, ktoré im prinesú najviac prostriedkov na ďalšie činnosti.

1.2.2 Snaha nevyužívať marketing chudoby v mediálnych produktoch

Hoci v súčasnosti prebieha rozmach argumentov proti využívaniu metód marketingu chudoby, a povedomie o problematike zobrazovania chudoby v médiách sa zvyšuje, oponujúce názory stále netvorí väčšinový prístup. CCIC delí tieto názory do nasledujúcich kategórií: podkopávanie ľudskej dôstojnosti a podporovanie rasizmu; podporovanie existujúcich mýtov o rozvojovom svete; prispievanie k pocitu beznádeje a márnosti.

Napríklad v prípade kategórie: Podporovanie existujúcich mýtov o rozvojovom svete ide o to, že obrazy bezmocných ľudí z rozvojových krajín vyvolávajú názor, že im môžu pomôcť len charitatívne organizácie z globálneho Severu – že oni sami v rámci globálneho Juhu sa o seba nedokážu postarať. Týmto spôsobom sú zastierané všetky úspechy miestnych rozvojových organizácií aj tamojších ľudí, zapájajúcich sa aktívne do projektov organizácií, fungujúcich na partnerskej báze, spolupráci.

Treba si uvedomiť, že vyvolávanie pocitu, že sa situácia v rozvojových krajinách nijako nelepší, môže v darcoch naštartovať pocity márnosti, zbytočnosti a viesť k postupnej strate dôvery v rozvojovú pomoc, resp. spoluprácu, a tým pádom aj k zníženiu finančných príspevkov. Ide o jednoznačne negatívny dôsledok marketingu chudoby – preto sa ho treba snažiť vytesniť z mediálnych výstupov rozvojových organizácií.

2. MEDIÁLNE ŠKOLENIE PRE ŠTUDENTOV MEDZINÁRODNÝCH ROZVOJOVÝCH ŠTÚDIÍ

Katedra rozvojových štúdií (KRS) Prírodovedeckej fakulty Univerzity Palackého v Olomouci kladie veľký dôraz na vzdelávanie v ústrety potrebám praxe a dobrej uplatniteľnosti študentov v odbore. Medzinárodné rozvojové štúdiá (MRS) sú vôbec prvým uceleným študijným odborom tohto typu v Českej republike i v regióne strednej Európy. Dlhodobo sa uprednostňuje osobný prístup, kvalitná teoretická príprava, sprevádzaná skúsenosťami z praxe a terénu. Len na takomto základe, ktorý umožňuje profiláciu a špecializáciu absolventov, je možné produkovať kvalitných odborníkov – pripravených na okamžitý nástup do špecializovaných inštitúcií alebo organizácií. Súčasťou štúdia sú aj odborné terénne exkurzie do rozvojových organizácií

11 CCIC, 2008, s. 3

12 CCIC, 2008, s. 4

a za projektmi rozvojovej spolupráce v programových krajinách českej zahraničnej rozvojovej spolupráce (ZRS ČR).

2.1 Projekt odbornej terénnej exkurzie do Moldavska

Katedra rozvojových štúdií sa v roku 2015 (už po tretí raz) rozhodla vytvoriť projekt odbornej terénnej exkurzie do Moldavska, vďaka ktorému mali študenti MRS možnosť navštíviť túto krajinu a pozrieť sa na české aj úniijné projekty rozvojovej spolupráce zblízka – čerpať informácie od ich realizátorov, ale aj cieľových skupín a zároveň spoznať realitu jednej z prioritných krajín ZRS ČR.

Projekt¹³ „Rozvojová spolupráca v praxi – Exkurzia do Moldavska“, realizovaný z finančných prostriedkov Českej rozvojovej agentúry v rámci Európskeho roka rozvoja, je ďalší z radov projektov Katedry rozvojových štúdií PrIF UP, ktorý cieľi jednak na zvýšenie uplatniteľnosti študentov MRS, ale aj na šírenie povedomia o ZRS ČR a RS EÚ, ich konkrétnych projektoch aj realite v konkrétnej krajine u širokej verejnosti.

Popri cieľi 1 (Obohatenie teoretických vedomostí študentov Katedry rozvojových štúdií o praktické skúsenosti s projektmi ZRS ČR a RS EÚ, realizovanými v Moldavsku) sa v projekte objavuje aj Cieľ 2: Rozšírenie vedomostí študentov vybraných škôl a verejnosti o Moldavsku ako prioritnej krajine ZRS ČR a realizovaných rozvojových projektoch. V rámci tohto cieľa a jeho aktivít študenti vytvárajú rôzne mediálne a multiplikačné výstupy, ktoré sa opierajú o ich vlastnú skúsenosť z účasti na exkurzii v Moldavsku (v septembri 2015). Aby boli schopní mediálne výstupy efektívne a eticky vytvárať, ako aj zdieľať s ostatnými študentmi, bola im poskytnutá podpora v podobe úvodného, predvýjazdového školenia, vedeného žurnalistkou, ktoré sa dlhodobo venuje prepojeniu oblasti médií a rozvoja. Odborná garantka sa aktívne podieľala aj na realizácii exkurzie v Moldavsku a bola študentom plne k dispozícii pri výbere tém i žánrov pre mediálne výstupy. Takisto 15 účastníkom exkurzie pomáhala so spracovaním informácií a zhotovovaním obrazového materiálu i správ z navštívenej krajiny. Na základe vlastnej skúsenosti a vyššie uvedenej prípravy sú študenti schopní realizovať svoje vlastné aktivity – besedy na stredných školách, výstavy fotografií, písanie článkov i blogov, prezentácie v rámci výučby na KRS.

Vzdelávanie študentov MRS v oblasti komunikácie predstavuje jednak prostriedok prevencie chýb, ktoré sa v žurnalistickej praxi pri pokrývaní rozvojových tém často objavujú, ale tiež poskytuje veľký potenciál pre ďalšiu popularizáciu a zviditeľnenie aktivít ZRS ČR a RS EÚ, ako aj rozvojovej a humanitárnej spolupráce medzi študentmi a tiež verejnosťou.

Každý zo študentov MRS, ktorí sa zúčastnili exkurzie, realizuje minimálne jednu vzdelávaciu aktivitu, alebo vytvorí minimálne jeden mediálny výstup (výstava, písaný novinársky prejav, rozhovor v rádiu, prezentácie na VŠ a SŠ). Celkovo to je minimálne 15 výstupov pre 300 účastníkov do decembra 2015.

V rámci merania úspešnosti a účinnosti projektu budú použité evaluačné formuláre, takisto sa bude pracovať s dátami z baseline a endline prieskumov (zobieraných pred a po exkurzii), v obsahovej analýze sa s časovým odstupom troch mesiacov od návratu z exkurzie budú dať zhodnotiť a porovnať publikované mediálne výstupy študentov.

13 Rozvojová spolupráca v praxi – Exkurzie do Moldavska, 2015 (Katedra rozvojových štúdií PrIF UP v Olomouci: Projektový dokument)

2.2 Nápomocná mediálna výchova pri vzdelávaní študentov

Mediálna výchova môže študentom bez novinárskej skúsenosti napomôcť zaujať kritický postoj voči médiám a vytvoriť vlastný názor na publikované materiály, ako sa aj pokúsiť o vlastnú mediálnu produkciu. Definícií mediálnej výchovy (media education) existuje niekoľko¹⁴, za smerodajnú možno brať definíciu Rady Európy, ktorá mediálnu výchovu definuje ako praktické vyučovanie zacielené na budovanie mediálnej kompetencie, chápanej ako kritický a rozlišujúci postoj voči médiám s cieľom vychovať emancipovaných občanov, schopných vytvoriť si svoj vlastný názor na základe prijatých informácií (Dokument č. 1466/200). Cieľom je získanie mediálnych kompetencií, ktoré môžeme chápať ako schopnosť narábať s médiami, spôsobilosť prijímať a interpretovať mediálne obsahy a aktívne sa zúčastňovať procesu mediálnej komunikácie.

Na základe skúsenosti zavedenia mediálnej výchovy ako prierezovej témy v českých školách M. Pastorová¹⁵ zdôrazňuje, že ak chceme vyzbrojiť študentov základnou úrovňou mediálnej gramotnosti, je potrebné, aby žiaci mohli: získať a uplatniť základné poznatky o úlohe a fungovaní médií v spoločnosti; zorientovať sa v ponuke mediálnych produktov; naučiť sa kritickému mysleniu vo vzťahu k médiám; využívať potenciál médií; ale aj sa informovať a aktívne sa zapojiť do mediálnej komunikácie. Práve to bolo cieľom predvýjazdového mediálneho školenia, ako aj uvedenia mediálneho vzdelávania a konkrétnej produkcie z exkurzie medzi aktivity projektu KRS (spomínanej terénnej exkurzie do Moldavska).

2.2.1 Mediálne vzdelávanie pred odjazdom a počas exkurzie

Je potrebné, aby študenti nielen rozumeli médiám a boli upozorňovaní na negatívne vplyvy (manipulácia, stereotypizácia, diskriminácia), ale aby boli oboznámení aj s pozitívnym využitím médií v prospech samovzdelávania či voľnočasových aktivít. Webové stránky, ako napríklad Zodpovedne.sk sú zamerané na zodpovedné používanie internetu a mobilnej komunikácie. Tu môžeme hovoriť aj o tzv. neformálnom vzdelávaní v oblasti mediálnej výchovy. Práve o neformálny prístup šlo počas mediálnych workshopov a ich debriefingov už počas samotnej terénnej exkurzie do Moldavska (pri kontrole zhotovených fotografií, analýze zhotovených poznámok zo stretnutí s rozvojovými organizáciami či formulácií otázok, kladených na realizátorov či prijímateľov ZRS ČR v Moldavsku).

Študenti MRS boli počas predvýjazdového mediálneho školenia upozornení na špecifiká spravodajskej žurnalistiky¹⁶. Pri tvorbe spravodajstva by mali žurnalisti, študenti mediálnej komunikácie, ale aj blogeri dodržiavať určité verejne známe zásady. Ide najmä o vecnosť, presnosť, úplnosť, spoľahlivosť, včasnosť a citovú neutralitu.

Klasické, najmä printové médiá majú možnosť manipulovať a ovplyvniť svojich čitateľov titulkami, perexom, zalamovaním strán, umiestnením článku, ale aj výberom fotky a zhotovením popisky. Sila médií nespočíva len v samotnom informovaní, ale najmä vo výbere tém – o čom sa bude hovoriť a premýšľať. Teória agenda setting¹⁷ vychádza z predpokladu, že dôraz a význam, ktorý zo strany médií kladie určitému problému, ovplyvňuje spôsob, akým tento problém vníma a prijíma publikum. Mediá podľa tejto teórie disponujú mechanizmami, ktoré majú schopnosť určovať, o čom recipienti premýšľajú a ktoré otázky vnímajú ako dôležité.

14 Háberová, 2012, s. 6

15 Pastorová, 2008, <http://clanky.rvp.cz/>

16 Háberová, 2012, s. 6

17 Kunczik, 1995, 198-203 s.

2.2.2 Tvorba a úprava fotografie počas terénnej exkurzie

Mediálne školenie pozostávalo aj z časti, zameranej na techniky manipulácie publika obrazovým materiálom. K manipulácii môže dochádzať mnohými spôsobmi a ani autor, pokiaľ nemá dostatočné skúsenosti, si ich často nemusí uvedomovať. Tým viac sa stáva pre bežného diváka ťažko rozoznateľná. Prvou možnosťou je teda forma manipulácie, ktorá prebehne už pri samotnom vytvorení snímky. Môže sa jednať o uhol pohľadu, veľkosť záberov (veľký celok, celok, polocelok vs. polodetail, detail, veľký detail)¹⁸, spôsob rámovania (výrez scény), vzdialenosť od fotografovaného objektu a mnohé iné parametre. Ich vzájomná kombinácia má potom za úlohu vyvolávať v divákovi určité pocity a emócie, ktoré majú potenciál do istej miery ovplyvniť či upevniť ich názory alebo podporiť stereotypy.

Uhol pohľadu môže vo vertikálnej rovine symbolicky vyjadrovať pozíciu moci. V prípade, že na fotografovaný objekt pozeráme z nadvhľadu, môže to pôsobiť, akoby sme na neho nazerali z dominantnej pozície a vyjadrovali tým tak nadradenosť. V opačnom prípade bude vyzdvihnutá symbolická dominancia fotografovaného objektu.¹⁹ K rovnomernému “rozloženiu moci” a vyjadreniu rovnocennosti dochádza v zábere z pozície úrovne očí. Horizontálna rovina (teda uhol od frontálneho k profilovému pohľadu) zase môže vyjadrovať silu vzťahu, ktorý si k fotografovanej osobe fotograf vytvorí. Frontálny pohľad viac vťahuje do deja na rozdiel od profilovej snímky, ktorá skôr podporuje pocit nezúčastnenosti. Všetky tieto pravidlá si mohli overiť v praxi aj študenti MRS počas terénnej exkurzie do Moldavska počas zhotovovania fotografií počas jednotlivých návštev projektov ZRS ČR.

Ďalšou bežnou technikou v digitálnej fotografii je úprava, vytvorená až po odfotení. Výberom, prípravou a umiestnením takejto fotografie k novinárskemu prejavu či PR materiálu sa okamžite formuje názor verejnosti na zobrazovanú udalosť, komunitu ľudí či zobrazovanú krajinu – je teda potenciálnym zdrojom manipulácie²⁰.

V súvislosti s marketingom chudoby sa asi najčastejšie stretávame s fotografiou retušovanou, zinscenovanou alebo uvedenou v nesprávnom kontexte. Retuš sa spravidla týka upravenia jasov a kontrastu, pridávajúceho na dramatickosti. V súvislosti s inscenovanou fotografiou²¹ sa hovorí o “tzv. nahrávke, teda zámernej úprave fotografovanej skutočnosti.” O manipuláciu ide v prípade, že inscenovanie autor nepriзнаá a predkladá ho ako autentický záber. K tejto úprave môže dochádzať z dvoch dôvodov. Môže ísť o inscenovanie z rôznych kompozičných dôvodov (objekty sa napríklad nezmestia do záberu alebo sa vyskytujú v zlých svetelných podmienkach: tieň, protisvetlo, a sú umelo presunuté pod.). V horšom prípade sa jedná o zámernú snahu skresliť danú situáciu – z politických, senzáciových či iných dôvodov.

2.3 Etický Kódex používania obrazov a podávania správ

Kódex používania obrazov a podávania správ zostavili v roku 2006 mimovládne organizácie, ktoré pracujú v oblasti humanitárnej pomoci, rozvoja a rozvojového vzdelávania – združené v Európskej konfederácii mimovládnych rozvojových a humanitárnych organizácií CONCORD. V nasledujúcich rokoch podobné kódexy na národnej úrovni prijali aj jednotlivé členské organizácie CONCORDu (česká FoRS i slovenská Platforma MVRO). Jedného z prvých ucelených

18 Baluchová, 2011, s. 4

19 Svobodová, 2015, s. 15

20 Baluchová, 2014, s. 140

21 Lábová a Láb, 2009, s. 37

sprivedcov²² k tejto téme (najmä o výbere a použití obrazového materiálu z rozvojových krajín v našich podmienkach) spracovala írsky platforma mimovládnych rozvojových organizácií Dóchas.²³ O niekoľko rokov neskôr bol opäť v dielni Dóchas vytvorený ilustrovaný sprivedovca²⁴, ktorý má za úlohu jednotlivé body kódexu rozobrať, špecifikovať a uviesť názorné príklady pre lepšiu implementáciu.

Tento kódex napomáha rozvojovým neziskovým organizáciám vyhýbať sa vytváraniu a prehľbovaniu existujúcich stereotypov o rozvojových krajinách pri plánovaní a implementovaní svojich PR stratégií. Pravidlá nefungujú ako pevne dané a nemenné, pretože pracujú s ťažko definovateľnými pojmami – slúžia teda len ako súhrn základných princípov, ktorými by sa signatárske organizácie mali riadiť.

Aj v českom a slovenskom kontexte existuje súbor pravidiel: Kódex používania obrazov a podávania správ²⁵, ktoré je potreba rešpektovať pri informovaní o zažitej skúsenosti či situácii z rozvojovej krajiny v masovo-komunikačných prostriedkoch. Súbor pravidiel bol predstavený aj študentom MRS počas predvýjazdového mediálneho školenia pred exkurziou do Moldavska.

3. PREPOJENIE MEDIÁLNEJ VÝCHOVY A GLOBÁLNEHO ROZVOJOVÉHO VZDELÁVANIA

Dôsledky globalizácie sa priamo dotýkajú obyvateľstva v SR aj v ČR – zodpovedne myslieť by teda nemal len štát, ale aj jednotlivci, počnúc študentmi na strednej či vysokej škole. Súčasná situácia (negatívne dôsledky zmeny klímy, migrácia, utečenecká kríza) vo svete núti ľudstvo, aby sa situáciou vážne zaoberalo a aby hľadalo riešenia na lokálnej i na globálnej úrovni.²⁶ Každé riešenie si vyžaduje aktívny vstup ľudí, vytvára sa tak tlak na rozvoj vzdelávania v tomto smere.

Hlavným zmyslom²⁷ existencie rozvojového vzdelávania je zmierňovať negatívne dôsledky globalizácie, kolonializmu, civilizačného a technologického rozvoja ľudstva. Rozvojové vzdelávanie má pripraviť človeka na chápanie súčasného sveta v jeho premenlivosti a má v ňom rozvinúť také zručnosti a schopnosti, ktoré mu umožnia zvládať svoj život aj potom, čo sa situácia vo svete zmení.

Rozvoj spôsobu myslenia o svete a kritického myslenia o faktoch, ktoré sa nám podávajú, sú nevyhnutnou súčasťou rozvojového vzdelávania. O to ťažšie je dané fakty spracovať a verejne prezentovať v podobe mediálnych výstupov či diskusií na školách, nakoľko globálne problémy sú tak zložité, že ku každému z nich existuje množstvo stanovísk a teórií. Napriek komplexnosti a náročnosti problematiky sa medzi zručnosti študentov MRS pred výjazdom na terénnu diskusiu do Moldavska zaradili aj: písanie spravodajského článku, overenie si informácií a zdrojov, zhotovovanie fotografií z projektov ZRS ČR, vedenie rozhovorov s realizátormi alebo prijímateľmi rozvojovej pomoci, ako aj zorganizovanie verejného eventu a verejné prezentovanie v materinskom (českom či slovenskom) i cudzom (anglickom či ruskom jazyku).

22 Code of Conduct: Guide to the Code of Conduct, 2006, www.ideas-forum.org.uk

23 Baluchová, 2014, s. 146

24 The Illustrative Guide to the Dóchas Code of Conduct on Images and Messages, 2014, www.dochas.ie

25 Kódex používania obrazov a podávania správ, 2010, <http://mvro.sk/sk/kodexy/kodex>

26 Mistrík, 2014, s. 21-30

27 Mistrík, 2014, s. 21-30

ZÁVER

Jeden z výstupov projektu Katedry rozvojových štúdií Prírodovedeckej fakulty Univerzity Palackého v Olomouci, financovaného z prostriedkov Českej rozvojovej agentúry v rámci Európskeho roku rozvoja, sa zameriaval na zvýšenie zručností v oblasti mediálneho vzdelávania a informovania verejnosti o rozvojových témach. Študenti sa počas predvýjazdového školenia oboznámili so zásadami tvorby novinárskeho celku, s metódami manipulácie publika (a ich identifikovania), no najmä s princípmi textovej a obrazovej komunikácie pri spracovaní tém rozvoja – s pravidlami Code of Conduct on images and messages. Po školení boli viac schopní senzitivne a eticky informovať o rozvojových problémoch a najmä o súčasnej situácii v Moldavsku.

Počas celej exkurzie mohli študenti zhotovovanie mediálnych výstupov konzultovať s prítomnou žurnalistkou, venujúcou sa prepojeniu mediálnej produkcie a medzinárodného rozvoja. Počas septembrovej terénnej exkurzie do Moldavska, ako aj po návrate mediálna trénerka bola nápomocná 15 účastníkom exkurzie – študentom MRS pri konzultácii výberu a spracovania tém, konkrétne vytváraní mediálnych výstupov pre vhodné médium.

Ďalším výstupom projektu je dosiahnutie multiplikačného efektu exkurzie prostredníctvom verejnej prezentácie – predovšetkým vzdelávania študentov SŠ a VŠ o Moldavsku (ako priority krajine ZRS ČR) priamo účastníkmi exkurzie. Tým priamo zužitkujú svoje nové nadobudnuté zručnosti – v rámci mediálnej výchovy aj globálneho rozvojového vzdelávania.

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DOBROVOLNÍCTVO A OBČIANSKA ANGAŽOVANOSŤ AKO KLÚČOVÉ FAKTORY TRANSFORMÁCIE OBČIANSKEJ SPOLOČNOSTI V UKRAJINE PO UDALOSTIACH NA MAJDANE

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Abstract

Civil protests in Ukrainian cities in 2013-2014 called „Majdan“, annexation of Crimea, as well as the war in Eastern regions, resulted into two unique social changes. The first is formation of political nation in Ukraine. People of various ethnic origins, like Russians, Crimean Tatars, Jews, Poles, Belarusians, and others who previously had not define themselves in terms of political nation, were inspired by events of 2014-2015 to do so. Those who remained on the territory under control of the Ukrainian government have defined themselves as Ukrainians regardless language they are using on daily basis, or ethnicity of their ancestors. The second change is unprecedented raise of volunteerism and raise of trust of the society towards volunteers. Volunteerism is perceived in several levels. The simplest interpretation of “a volunteer” is a soldier fighting in the East, or someone helping to collect funds or material help for Ukrainian army. A more complex picture of a volunteer is someone working in humanitarian issues or doing community work in his/her municipality. In Ukrainian opinion polls, the group most trusted they are volunteers. This is a fact dramatically changing position of civil society and prospects of transformation of the country towards EU standards of democracy. After Majdan, Ukrainian citizens stopped to count on above powers to bring democratic changes to their lives. They started to rely more on themselves and their fellow citizens.

Kľúčové slová: komunitný rozvoj, dobrovoľníctvo, občianska spoločnosť, Ukrajina

ÚVOD

Politické analýzy situácie na Ukrajine nie sú veľmi optimistické. Anexia Krymu sa javí ako nezvratný fakt na politicky predvídateľné obdobie. Vojna so separatistami v Donecku a Luhansku sa dostala do patovej situácie, v ktorej žiadna zo strán nemá motiváciu sa dohodnúť a zároveň má, aspoň zatiaľ, dosť síl pokračovať v bojoch. Minské dohody sa nedodržujú. Podľa

analytikov ich dodržanie v súčasnej politickej situácii nie je možné, nakoľko k nim neexistujú vypracované procedúry a interpretácie jednotlivých bodov. (Duleba, 2015) Zložitosti pri prijímaní zákonov o decentralizácii krajiny ukazujú, ako je ťažké pod politickým tlakom medzinárodných aj domácich stakeholderov realizovať reformy, ktoré nie sú v spoločnosti prediskutované, a nie je čas dosahovať v ich prípade čo i len zdanie národného konsenzu. V čase písania tohto článku sa krajina pripravuje na voľby do územných samospráv. Je s tým spojených mnoho obáv z návratu či udržania sa pri moci oligarchami sponzorovaných „starých štruktúr“, z korupcie a ďalšej profanácie hodnôt, ktoré boli hybnou silou protestov na Majdane.²⁸ Preto je na mieste otázka, čo sa vlastne na Ukrajine zmenilo? Je to len snaha EÚ „prebiť“ svojou politickou ponukou Rusko, alebo Majdan zanechal aj iné hlbšie zmeny? Kam bude v budúcnosti ukrajinská spoločnosť smerovať? Skončí sa Majdan podobne ako pomarančová revolúcia len sklamaním a frustráciou, alebo zanechal niečo trvalé a nezvratné?

Skúsenosti autorky v práci s občianskou spoločnosťou svedčia o tom, že ukrajinská spoločnosť sa po Majdane zmenila skutočne zásadným spôsobom, a to minimálne v dvoch parametroch. Prvým je vytvorenie politického národa z etnicky zmiešanej spoločnosti ľudí s rôznou historickou skúsenosťou a identitou. Druhým je nárast dobrovoľníctva a spoločenského statusu dobrovoľníkov. Oba tieto parametre vytvorili zásadne iné predpoklady pre úlohu občianskej spoločnosti v ďalšej vývoji krajiny. Pred r. 2013 boli občianske organizácie často vnímané ako umelé výsledky pôsobenia zahraničných donorov a politických inštitúcií, než niečo prirodzene generované ukrajinskou spoločnosťou a zároveň potrebné pre spoločenský a politický život v krajine.

Majdan dal množstvu ľudí pocit sily a možnosti reálne ovplyvňovať dianie vo svojej krajine, regiónie či meste. Vytvoril podmienky pre prirodzený občiansky aktivizmus a komunitný rozvoj, ktorý je vnímaný ako cesta na zlepšenie kvality života. Odovzdanosť a čakanie na politickú zmenu zhora je minulosťou, čoraz viac sú viditeľné hnutia a aktivity ukazujúce silu aktivít „pri koreňoch tráv“.

Tento text sa opiera o prípadové štúdie 30 lokálnych aktivít v rôznych mestách Ukrajiny a hĺbkové rozhovory s 10 lídrami či animátormi komunitného rozvoja, ktorí dané aktivity realizujú. Pozorovania sa uskutočňovali v priebehu približne jedného roka (jeseň 2014 – jeseň 2015), semištrukturované rozhovory prebehli v auguste 2015. Prezentované aktivity sú v súčasnosti podporované aj z prostriedkov SlovakAid. Nejde o komplexný výskum, skôr o kvalitatívnu sondu odzrkadľujúcu meniacu sa kvalitu občianskej spoločnosti.

1. ZMENY V OBČIANSKEJ SPOLOČNOSTI PO UDALOSTIACH NA MAJDANE

Prvá vlna dobrovoľníctva vznikla ešte počas Majdanu. Nielen mladí ľudia z celej krajiny prichádzali do Kyjeva podporovať protestujúcich svojou vlastnou prítomnosťou, ale aj materiálnou pomocou, potravinami, ako aj prostriedkami na prežitie na uliciach v podmienkach chladnej zimy. Po krvavých útokoch na protestujúcich vo februári 2014 dobrovoľníctvo nabralo iné podoby. Vznikali siete zdravotníckej pomoci zraneným, ktorí sa báli ostať hospitalizovaní

²⁸ Pod označením „Majdan“ alebo „protesty na Majdane“ sa v tomto článku označujú nielen krvavo potlačené protesty v Kyjeve v r. 2013-2014, ale aj udalosti v iných mestách ako Lvov, Charkov, Černigov, atď., ktoré podporovali zmenu vtedajšej politickej moci a smerovanie krajiny k zblížovaniu s EÚ.

v štátnych zdravotníckych zariadeniach z dôvodov únosov a niekoľkých prípadoch zmiznutí bez stopy týchto pacientov. Príkladom je sieť Narodnyj hospital, ktorá spájala niektoré zdravotnícke zariadenia, poľné nemocnice v kyjevských chrámoch, ako aj mobilné tímy zdravotníkov a dobrovoľníkov. (Revolucionnoe dejstvie, 2014) Zaujímavosťou je, že medzi jej organizátorov patrili úspešní podnikatelia, ktorí sami pracovali ako dobrovoľníci. (Človek v ohrození, 2014) V prvej fáze sa teda dobrovoľníctvo viazalo bezprostredne k udalostiam v Kyjeve a v iných mestách zapojených do protestov.

V druhej fáze, po anexii Krymu a v začiatkoch vojny na východe krajiny vznikla humanitárna kríza v podobe desiatok tisícov presídencov, ktorí utekali pred vojnou, neistotou, či politickými perzekúciami. V lete 2015 sa odhady počtu osôb vnútorne presídlených z dôvodu vojny a anexie Krymu pohybovali od konzervatívneho necelého milióna osôb, ako uvádza ukrajinská vláda podľa svojho registra, až po takmer milión a pol ľudí podľa nezávislých zdrojov a UNHCR. (Segodnya.ua, 2015), (Internal displacement monitoring centre, 2015) Od jari 2014 vzniklo na Ukrajine množstvo národných i lokálnych iniciatív zameraných na pomoc týmto ľuďom. Na začiatku sa pomoc zameriavala predovšetkým na základné potreby na prežitie, ubytovanie, umiestnenie detí do škôl a predškolských zariadení, právnu a psychologickú pomoc, hľadanie práce, apod. Viaceré národné iniciatívy vznikli na základe existujúcich mimovládnych organizácií s dlhoročnou reputáciou a ľudskoprávnym či sociálnym zameraním. Príkladom môže byť iniciatíva VOSTOK-SOS, (Vostok SOS, 2014) ktorá vznikla pri ľudskoprávnej organizácii Postup, ktorá sa z dôvodu represii bola nútená presťahovať z Luganska do Kyjeva. Pôvodne sa organizácia venovala budovaniu kapacít novinárov a podpore slobody slova. Svoju ľudskoprávnu agendu si ponechala, avšak zároveň vytvorila mladý tím ľudí, ktorí sa venujú nielen pomoci presídlencom, ale aj evakuácii civilných osôb z bojových zón a predovšetkým dodávke humanitárnej pomoci ľuďom, ktorí sú v oblastiach kontrolovaných separatistami odrezaní od zdrojov potravín, vody, paliva a liekov. Počet lokálnych iniciatív na pomoc presídlencom v celej Ukrajine je však prakticky nemožné spočítať. Takmer v každom meste sa pri supermarketoch pohybujú dobrovoľníci zbierajúci potraviny či peniaze. V chrámoch sú vyhlásené zbierky na pomoc nielen ukrajinskej armáde, ale tiež ľuďom v núdzi, čo prišli o všetko kvôli udalostiam r. 2014-2015.

Zaujímavo sa vyvíjal vzťah medzi ukrajinskými a veľkými medzinárodnými humanitárnymi organizáciami. Ukrajinci mali možnosť pozorovať, že z dôvodu ohrozenia bezpečnosti svojich pracovníkov sa medzinárodné organizácie takmer vôbec nezapájajú do pomoci ľuďom v konfliktných zónach. „...Existencia prísnych pravidiel v týchto organizáciách (predovšetkým týkajúcich sa bezpečnosti spolupracovníkov) im nedovoľuje adekvátne reagovať a podporovať ľudí počas konfliktu. Ukážkovým príkladom je ukrajinský konflikt. Koncom januára (2015 – pozn. aut.) počas eskalácie bojových akcií boli prvými a kľúčovými aktérmi pri evakuácii civilného obyvateľstva z bojových zón práve domáci ukrajinskí dobrovoľníci. Ani jedna medzinárodná organizácia sa vecou nezaoberala až do otvorenia koridoru, lebo nemali záruky bezpečnosti.“ (ZN,UA, 2015) Ťažisko humanitárnej pomoci teda ani zďaleka neležalo za hranicami krajiny, ale práve na zmobilizovanej občianskej spoločnosti, množstve viac či menej sformalizovaných iniciatív, ktoré sa snažili pomôcť svojim spoluobčanom postihnutým vojnou a represiami.

Ďalšou fázou aktivít sú tie na pomedzí humanitárnej pomoci a komunitnej práce, ktoré sa snažia pomôcť integrovať presídlencom do ich nových komunit. Hľadajú spôsoby komunikácie, odbúravania stereotypov a vzájomnej nedôvery medzi pôvodným obyvateľstvom a prišielcami, ako aj spôsoby spoločného trávenia voľného času, či riešenia problémov municipalít, netýkajúcich sa bezprostredne presídencov. V mnohých miestach sú práve presídlencom tou aktívnou zložkou miestnej komunity, ktorá túži zlepšiť podmienky vo svojom novom domove (viď

príklad z mesta Kremenčug opísaný nižšie). Veľmi cennou zložkou občianskej spoločnosti na Ukrajine, ktorá je paradoxne relatívne málo viditeľná zo zahraničia, sú práve lokálne iniciatívy a projekty zamerané na kultúru, vzdelávanie, voľný čas, životné prostredie, či komunálne problémy miest a obcí. Tieto iniciatívy boli prítomné už pred r. 2013, ich dosah však často siahal len po hranice danej obce. Až po majdanských udalostiach sa ukázalo, že komunitný život dokáže viac, než len riešiť problém odpadkov či chýbajúceho kultúrneho vyžitia. Existujúce sociálne väzby a lídri so zručnosťami komunitného rozvoja sú schopní reagovať na celospoločenské konflikty a pôsobiť na miestnej úrovni ako katalyzátor hlbších spoločenských a politických zmien smerom k participatívnej demokracii a právnemu štátu.

Táto mnohostranná činnosť dobrovoľníkov priniesla nebyvalú úctu k ľuďom, ktorí sa venujú dobrovoľníckej práci. Až do takej miery, že dobrovoľníctvo „prišlo do módy“. Ako uviedol jeden z respondentov, „*ak si pred Majdanom povedal niekomu na Ukrajine, že si dobrovoľník, pozerali na teba ako na blázna. Teraz ak nedobrovoľníčiš, si mimo. Dobrovoľníctvo je módou. Byť dobrovoľníkom je 'in.'*“ Dobrovoľníci sú podľa prieskumov verejnej mienky jednou z najvplyvnejších skupín v krajine. (UKRINFORM, 2015) Tešia sa tiež najväčšej dôvere zo všetkých sociálnych skupín a inštitúcií v Ukrajine. Podľa údajov z leta 2015 dobrovoľníkom dôveruje až 67 % Ukrajincov. (BBC Ukraine, 2015)

2. DOBRODEL: KOMUNITNÉ INICIATÍVY AKO HYBNÁ SILA AKTÍVNEHO OBČIANSTVA

Príkladom životaschopnej časti ukrajinskej občianskej spoločnosti, ktorej vznik ani pôsobenie sa však bezprostredne neviažu k udalostiam z Majdanu je nezisková organizácia AHALAR z Černigova. (AHALAR, 2015) Ako mnohé vznikla v polovici 90-tych rokov v čase boomu neziskového sektora spôsobeného aktivitou predovšetkým západných súkromných donorov po rozpade Sovietskeho zväzu. Od svojich počiatkov však lídri organizácie zvolili svoju vlastnú, a na vtedajšiu dobu originálnu stratégiu rozvoja, spočívajúcu v podpore malých prirodzených lokálnych iniciatív občanov. Tieto iniciatívy zvyčajne v svojich začiatkoch nie sú ukotvené v žiadnych mimovládnych organizáciách či oficiálnych inštitúciách. Dôležitým faktorom je rozvoj komunity. Tematické zameranie iniciatív je veľmi rozmanité, zahŕňa kultúrne, ekologické, ľudskoprávne, sociálne, či vzdelávacie aktivity. Organizácia poskytuje týmto komunitným lídrom nielen tréningy, ale aj každodenné konzultácie online či návštevy expertov v komunitách. V niektorých prípadoch podporujú komunity minigrantami.

Prelomovou aktivitou v sieti AHALAR bolo založenie portálu Dobrodel. Portál je výnimočný tým, že podporuje nielen výmenu informácií medzi komunitnými lídrami z celej Ukrajiny, medzi komunitami a širšou verejnosťou (napr. prostredníctvom prepojení na sociálne siete), ale aj crowdfundingové riešenia pre lokálny fundraising a spoluprácu s podnikateľským sektorom. Každý môže svoju komunitnú iniciatívu zaregistrovať na portály a hľadať pre ňu podporovateľov, dobrovoľníkov, či expertov. Portál je veľmi podrobne moderovaný a supervizovaný, takže obsahuje len aktivity, ktoré sú v súlade s misiou a hodnotami organizácie (nenásilie, pomoc iným, rozvoj komunity, dialóg, apod.). V čase písania tohto článku portál obsahoval približne 500 komunitných iniciatív v rôznom štádiu vývoja, od nápadov cez aktivity v realizácii, až po ukončené projekty. Z 30 podrobne monitorovaných iniciatív uvádzame príklady, ktoré ilustrujú obsahovú aj geografickú rozmanitosť.

Prípád 1: Zelená scéna, Černigov. Projekt vymyslela skupina hudobníkov, umelcov a hudobných redaktorov, ktorým nevyhovoval dovtedajší „zastaraný charakter kultúrneho života v meste“. Na začiatku bolo ich motiváciou vlastné kultúrne vyžitie a zábava pre okruh svojich známych. Postupne sa iniciatíva vyvinula na sériu pravidelných letných kultúrnych podujatí v zelených priestoroch mesta, pod spoločným názvom Zelená scéna. Okrem koncertov podujatia zahŕňali aj výstavy výtvarných diel, predvádzanie práce umeleckých remeselníkov, umelecké trhy, divadlo a iné formy umenia. Podujatia boli hojne navštevované aj zahraničnými umelcami. Organizátori spolupracujú s miestnou samosprávou a so súkromnými firmami. Do aktivít sa zapája množstvo dobrovoľníkov. Podľa odhadov sa v priebehu leta 2015 zúčastnilo predstavení okolo 8000 návštevníkov. (Dobrodel, 2015)

Prípád 2: Potrebujú našu pomoc, Domanivka – Mykolaivský región. Aktivita je zameraná na pomoc deťom s deviantným správaním a sklonsmi k porušovaniu zákona, ktoré sú v zoznamoch úradu pre sociálnu prácu s deťmi. Iniciátori sú ľudia s dlhoročnými skúsenosťami v práci s deťmi so sociálne marginalizovaných rodín. Ich práca zahŕňa spoluprácu s miestnou políciou, úradom sociálnej starostlivosti, samosprávou, ale predovšetkým s rodinami týchto detí. Hlavným ťažiskom je organizovanie zmysluplných voľnočasových aktivít pre deti, súčasťou ktorých je aj sociálna starostlivosť a výchova (krúžky, detské tábory, apod.). Projekt funguje už niekoľko rokov a aj vďaka nemu sa v mestečku znížila kriminalita mládeže o viac ako 50 %. Dôraz sa kladie na terénnu sociálnu prácu v rodinách. (Dobrodel, 2015)

Prípád 3: Občianska hliadka, Zdobunov – Rivenský región. Aktivitu založil stredoškólak, syn komunitného aktivistu, miestny lokálpatriot. Cieľom je pomocou osvety, ale aj občianskej intervencie bojovať proti nelegálne rozmiestňovanej reklame a oznamom. Iniciatíva zahŕňa informovanie obyvateľov v miestnych médiách, spoluprácu s políciou, miestnou samosprávou, ale aj dobrovoľnícke akcie ako upratovanie mesta či čistenie domov od nelegálne nalepených inzerátov. Napriek tomu, že aktivita je organizovaná mladými ľuďmi, z ktorých mnohí nie sú plnoletí, javí znaky veľmi zrelého prístupu k hľadaniu riešení problémov na miestnej úrovni zapájaním rôznych aktérov, dialógom a príkladom dobrovoľníckej práce. (Dobrodel, 2015)

Prípád 4: Teritória dobra, Achtyrka – Sumský región. Iniciatíva sa viaže na dobročinnú webovú stránku, ktorá umožňuje ľuďom v mestečku pomáhať sociálne slabým spoluobčanom. Adresná charitatívna pomoc umožňuje prepájanie darcov a prijímateľov pomoci. Sprievodné aktivity v knižnici zas umožňujú diskusiu o sociálnych problémoch v meste a možnostiach ich riešenia. Zapájajú sa aj miestne médiá a samospráva, či už ako inštitúcie v rámci svojich kompetencií a zamerania, či už ich predstavitelia ako súkromné osoby. Širším cieľom tejto iniciatívy je aktivizácia komunitného života v Achtyrke. (Dobrodel, 2015)

Prípád 5: ArtDom – Tvorivosť prináša teplo rodného domu, Kremenčug – Poltavský región. Aktivita vznikla ako pokus vytvoriť voľnočasovú činnosť pre ženy – presídlenky. Pravidelné stretávanie sa na tvorivých dielnach v rôznych miestach, vrátane otvorených mestských priestorov, pod vedením umelcov či umeleckých remeselníkov, malo priniesť zníženie stresu a hľadanie nových sociálnych väzieb pre tieto ženy, ktoré stratili domov. V priebehu jednej letnej sezóny sa však ukázalo, že projekt má potenciál spájať presídlenecov z miestnym obyvateľstvom, a navyše priniesol do mesta novú kvalitu stretávania a trávenia voľného času atraktívnu aj pre starosadlíkov, a to nielen ženy, ale aj mužov. (Dobrodel, 2015)

Mnohí komunitní aktivisti zo siete AHALAR udržujú medzi sebou živé kontakty nielen prostredníctvom portálu Dobrodel, ale aj vďaka podujatiam, ktoré spoločne navštevujú a navzájom sa na ne pozývajú. Aktuálne dianie v Ukrajine sa odzrkadľuje na charaktere projektov tým, že v mnohých sa objavujú presídlenci ako cieľová skupina. Viac sa zaoberajú riešením konfliktov a problémov v komunite spojených s presídlencami či vojnou (trauma vojakov navrátených z fronty), ale aj humanitárnych otázok.

3. POSTOJE KOMUNITNÝCH LÍDROV K SPOLOČENSKÝM ZMENÁM PO r. 2014

a) Motivácia pracovať s komunitou:

„Páčilo sa mi, ako pracujú rodičia. Oni stále niečo robili, nejaké projekty, tak som sa inšpiroval. Páči sa mi pomáhať druhým, verím v to, že každý môže urobiť veľa, ak len veľmi chce.“ Andrej, 16 rokov, Zdolbunov (AO)

Všetci z respondentov prejavovali vieru v schopnosť každého človeka formovať realitu okolo seba a chuť zapojiť sa do tejto zmeny, alebo ju priamo iniciovať.

„My sa už nesmieme sťažovať, že máme zlého prezidenta, my sami sme povinní niečo meniť. Ale je to ťažké, veľa ľudí má taký postoj, že keď ja platím dane, prečo to niekto neurobí? Ja vravím tak urob sám, zdvihni zahodenú fľašu, natri si múrik pred domom... Potom dás napiť túlavému psovi a už ti nie sú veci ukradnuté.“ Alexandra, 39 rokov, Černigov (AF)

Z výpovedí cítiť optimizmus, ktorý títo ľudia šíria.

„Môj život sa za posledného poldruha roka zmenil úplne zásadne. Žila som v Lugansku, mala som krásny dom, svoj biznis, všetko bolo nádherné. Prišla vojna a bála som sa tam zostať. Ušla som, aby moje dieťa neprežívalo tie stresy, čo tam hrozili. ... Verila som, že sa mi všetko podarí. Keď už som raz tu, budem žiť tu a teraz a nebudem čakať, že sa raz vrátim tam. ... Ľudia okolo mňa sa na mňa pozerajú ako na stimul prizrieť sa svojmu životu a uvidieť, že sa majú veľmi dobre a prestať sa sťažovať.“ Lena, 39 rokov, Kremenčug, presídlenka (LN)

„Vrátil som sa zo Španielska, kde som žil niekoľko rokov a vtedy všetci chceli odísť. Chcel som urobiť maličký projekt, ktorý by ukázal ľuďom, že sa dá urobiť niečo maličké u seba doma, aby všetci prichádzali k nám a nie my aby sme odchádzali za hranice.“ Andrej, 40 rokov, Kamenec Podolský

„Otvoriť ľuďom pohľad na to, že naše mesto môže byť krásne, ak ho máme radi. Ak to neurobíme sami, nikto to nespraví.“ LN

Mnohí z nich priznávajú, že svojimi aktivitami na začiatku uspokojovali aj svoje potreby inej kultúry, vzťahov v komunite, či trávenia voľného času.

„Nezúčastňovať sa Zelenej scény sa jednoducho nedalo. ... Mesto sa stalo otvorenejším pre nové informácie, pre kultúrny život, divadlo, filharmónia, ... prichádzajú turistické skupiny, ktoré špeciálne plánujú piatok, aby stihli Zelenú scénu.“ Dmitrij, 38 rokov, Černigov (DJ)

„Pochopila som, že treba spájať ľudí. ... Okolo je toľko stresu v spoločnosti, toľko negatívnej informácie, že treba s tým bojovať, treba uvoľňovať to napätie, ktoré si najviac odnášajú práve ženy.“ LN

b) Ako ovplyvnili udalosti na Majdane život a prácu komunitných lídrov:

Každý z respondentov reagoval na túto otázku veľmi emocionálne. Hlboké, až intímne zdôverenia sa s vlastnými zážitkami z toho obdobia často prekračovali rámec výskumu.

„Veľmi sa všetko zmenilo. Kým to bol len Euromajdan, veľmi som sa nezapájala. Po sklamaní z r. 2004, rozčarovanie z Juščenka... Bola som nahnevaná, že sa nikto mňa neopýtal, či chcem do EU, že nebolo referendum. Potom v januári zbili študentov, potom miznú ľudia. Nielen takí nejakí ľudia, ale môj známy. Potom prvá obeť. Šok. Potom februárové udalosti. Nikto nemôže pracovať, všetci pozerajú telku. Helmy, čierny dym. Umierajú ľudia. Bola som vtedy na služobnej ceste v Kyjeve, tesne predtým, ako zablokovali metro. Nedostala som sa do centra. Doma som to potom videla v televízii, ako zabíjali ľudí. Potom ich pohreb. Strašne sa nás to dotklo, ich životopisy: Študent, učiteľ, profesor – ľudia s veľkým potenciálom. Potom vojna s Ruskom. Do poslednej chvíle neveríš, to sa nestane že vojna s Ruskom. Potom telefonáty od kamarátov a rodiny z Ruska, že prečo bombardujeme Donbas. Čo? My bombardujeme? Totálne nepochopenie. Potom v Kryme dupali po ukrajinských zástavách. No z druhej strany nás to spojilo. Ľuda sa začali stretávať a viac rozprávať. Zrazu vidíš nebo. Potom odchádzajú na front naši známi, snažíme sa im pomôcť s výbavou a zapájame sa do dobrovoľníctva. Náš kamarát padol pod Kramatorskom. Vďaka ťažkým zbraniarom, ktoré oficiálne boli zakázané. Jeho pohreb sme veľmi prežívali.“ AF (etnická Ruska a Bieloruska)

„Je príjemné vidieť silu svojho národa, samoorganizáciu a to šílené dobrovoľníctvo. Už sa to nemôže vrátiť späť. Pociťujeme, že sa môžeme postaviť zlu.“ DJ

„Chcela som v Kremenčugu chodiť po ulici a kričať, ľudia, ako vám je tu dobre!“ LN (etnická Ruska, presídlenka z Luganska)

„Na Majdane som dobrovoľníčila. Zomrel tam môj dobrý kamarát. Dlho potom som nemohla pracovať, všetky ideály sa vo mne zlomili a musela som si vystavať svoju motiváciu odznova.“ Katarína, 28 rokov, Kyjev (KK)

„Bojím sa o syna, má 22 rokov, bojím sa o budúcnosť. Nerozumiem, prečo sa u nás dejú takéto strašné veci. (plač) Je smutné, že tí, ktorí mohli urobiť tento svet krajším, už nie sú medzi nami.“ Lena, 41 rokov, Černigov

c) Čo vidia ako najdôležitejšie pre budúcnosť svojej krajiny a svojej komunity:

Aj projekcia budúcnosti sa u komunitných aktivistov odvíja od ich videnia sveta, teda od ľudí, s ktorými pracujú.

„Všetko staré sa skôr či neskôr zmení. Ak budeme správne vychovávať mládež, môžeme predvídať aj vývoj krajiny.“ AO

„Nevrátiť sa z tej cesty, na ktorú sme nastúpili. Je také nebezpečenstvo, lebo ľudia si priliš zvykli, že za nich niekto rozhoduje. Rozmýšľajúci ľudia vidia, že nie všetko je dobré, čo sa u nás deje, ja tiež som nespokojná so súčasnou vládou, hoci som ich volila. Predovšetkým my sami musíme byť Európanmi.“ AF

„Dôležité je, že sa objavuje množstvo ľudí, ktorí robia svoje miesto lepším. Ak ich je veľa, pôjde dopredu celá krajina. Krajina vyletí na krídlach týchto ľudí.“ LN

„Dialóg o tom, ako deliť peniaze, kompetencie, ako rozhodovať o prioritách. Zatiaľ to ešte nevieme. Treba sa nám učiť v zahraničí.“ Oľga, 56 rokov, Achtyrka

„Čestnosť a zodpovednosť. My všetci máme vzťah v korupcii, každý by mal začať od seba. Vrátiť sa k zodpovednosti a k hodnotám.“ KK

Mnohí z respondentov sa priznali, že udalosti posledných dvoch rokov priniesli u nich krízu identity spojenú s ich etnicitou, miestnou príslušnosťou (presídlenci), rodinou v zahraničí (informačná voja), či stretom so smrťou, chudobou, stratou pocitu bezpečia:

„Ja som polovičná Ruska a polovičná Bieloruska. Mám veľmi rada ruský jazyk, môj rodný jazyk, literatúru, kultúru. Keď bolo u nás obdobie násilnej ukrainizácie, nesúhlasila som s tým. Teraz je iná doba. Je vojna. Keby to prišlo teraz, súhlasila by som a nijako ma to neohroží, lebo teraz je to jazyk nepriateľa a ešte sa to môže proti nám – Ukrajincom obrátiť. A veď je veľa krajín s rôznymi jazykmi...“ AF

„Vždy ma dráždilo, keď sa ma pýtali, či sa chcem vrátiť domov. Môj domov, to je Kremenčug, tam žijem. Lugansk, tam sú moje korene, odtiaľ je moja rodina. ... Najťažšie bolo vzdať sa možnosti návratu. Nechcem sa vrátiť. Minulý život už neexistuje a nechcem sa vrátiť do toho, čo tam je teraz.“ LN

„Keď som začala pracovať ako dobrovoľníčka, videla som deti, ktoré sú chudobné a vtedy som prehodnotila svoj život. Pochopila som, čo všetko mám a chcela som sa podeliť.“ Katarína, 28 rokov, Kyjev KK

ZÁVER

Prípádové štúdie i rozhovory s komunitnými lídrami potvrdili, že títo napriek kritickému pohľadu na domácu i zahraničnú politiku zdieľajú optimistické vyhladky na budúcnosť krajiny. Tento optimizmus odvíjajú od malých úspechov svojich lokálnych iniciatív a od zmien, ktoré pozorujú a ktorých sú súčasťou na miestnej úrovni. Táto podoba občianskej spoločnosti je najmä cez spopularizovaný pojem dobrovoľníctva pochopiteľná a akceptovateľná pre väčšinu občanov. Preto je na mieste podpora tohto typu prirodzeného lokálneho aktivizmu, ktorý postupne naberá prvky participatívnej demokracie cez zapájanie rôznorodých aktérov naprieč sektormi a sociálnou hierarchiou.

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TOURISM AS A WAY OUT OF POVERTY FOR LDCS

Eva Lackovičová

Abstract

The paper takes tourism as a tool that can alleviate poverty in LDCs. I chose to analyse two case studies of countries which embraced tourism in their poverty-reduction policies. In the first chapter I will define the important terms, which will be used later. Tourism, development and pro-poor tourism concept will be explained, as well as its effects and advantages. The second chapter focuses on Rwanda and development of tourism there with the pro-poor aspect. Attention will be given to the ways how local people can participate in tourism industry and how it affects them both positively and negatively. The third chapter unfolds the tourism and pro-poor tourism effects on the local communities in the Gambia. Moreover, I will try to define the positive and negative impacts of tourism development on the poor and how they are involved in the sector. The paper ends with some recommendation and conclusions.

Keywords: tourism, poverty, pro-poor tourism, local communities

INTRODUCTION

Tourism is one of the largest and fastest growing industries in the world. Thus, non-governmental actors and international organizations have become more invested into introducing initiatives that reduce poverty with help of tourism. Many of the countries decided to put trust into tourism, as 80 % of 56 LDCs have included tourism into their poverty reduction strategy. (Winchenbach, 2013)

The hypothesis, which will be tested here is that tourism has a great power and can help improve lives of people in developing countries and ameliorate country's overall performance. In order to do that it is important to look at the positive as well as negative impacts of tourism in LDCs. Thus, the main research question asks how tourism alleviates poverty in LDCs. In the paper I will try to find answers to questions whether the character of tourism enables it to be used as an instrument in poverty reduction strategies, and further what are benefits for the poor and how they can be constrained. I will demonstrate the issue on two case studies, in Rwanda and Gambia.

1. THEORETICAL CONCEPTS

In order to be able to assess the influence of tourism in chosen case studies, we need to at first look into definitions of terms and their interconnectedness. As tourism in itself does not have development as its core objective, it is important to look at how these terms can be connected.

Mitchell and Faal state several advantages of tourism:

- tourism is generally labour intensive, although not that much as agriculture, but it can therefore have an impact on large number of people through the labour market
- tourism has potential linkages with other industries like fishery, agriculture and thus can minimize the 'leakage' effect²⁹
- tourism provides off-farm diversification opportunities, especially in areas which do not attract other types of development
- tourism can provide poor countries with export opportunities where there are few other options available
- it can have initial demand for goods or industry, which can itself develop into growing sector
- tourism products can generate demand for products such as natural resources or culture, to which the poor have often access
- tourism brings people to the product and not the other way around
- infrastructure connected to tourism development can provide essential services for the local community. (Mitchell, Faal, 2008)

It is often the created tie between the consumers which is mostly considered as the poverty-reduction potential of tourism, as it raises possibility of linking the poor directly to the consumers. The direct impact of tourism on the poor can be through tourists purchasing goods and services. In this sense, the owners of businesses in the area and consequently its workforce could benefit from tourists. Apart from these effects, there are also indirect effects, which represent the purchase of inputs from other firms to support tourism and induced effects of tourism, which refer to the spending of income earned by owners of tourist-business and its employees. Moreover, the studies have shown that tourism shows rather large multiplier effect.

Secondary effects of tourism are often between 60 – 120 % of the direct effects and thus, every dollar spent in tourism has value of 1.60 USD – 2.20 USD in generated income. These secondary effects can also influence prices and wages in economy and with all the effects and their relation and influence to the poor, it will eventually depend on whether the people are employed or linked to tourism activities. Here the door opens for public interventions in order for those who are not, to be able to benefit from tourism as well. The long-term, dynamic effect of tourism on the local economy lies in benefits provided by tourism by inducing greater investment in infrastructure, business development, agriculture, human capital formation and other sectors. These investments can come from private or public sector and though primarily directed into the tourism sector, it is probable that the spillover effects will prevail in other sectors as well. Thus, the economy can be more dynamic in the long run, and thus

²⁹ Leakages are understood as payments made outside the tourist destination economy. It means it is the proportion of holiday price that does not reach or remain in the destination country. (in Mitchell, Faal, 2007)

it will also impact development and poverty. For that, tourism-led growth hypothesis was established, on the same level as the export-led growth hypothesis. (Winters et al., 2013)

The connection between tourism and poverty became more discussed and defined in the 1990s when the concept of 'pro-poor tourism' emerged as a mean of alleviating poverty. (Brown, Hall, 2008) "The term 'pro-poor tourism' is described as tourism that generates net benefits for the poor and aims to ensure that tourism growth contributes to poverty reduction." It is not any tourism product or sector of industry, rather an approach to developing and implementing tourism activities. (Spenceley et al., 2010) It claims, that with gradual change of tourism throughout the 20th century, the tourists are changing too. Of course, there are still tourists which prefer mass destinations and all-inclusive packages but the growing number of tourists who are aware of development issues, environment and sustainability allowed for new types of tourism to emerge. That is why ecotourism, community-based tourism is gaining more popularity. Also, special type of charity tourism and volunteer tourism emerged, in order to help with local projects in developing countries. These evolution of the industry suggests, that it developed itself and it now offers more viable options and possibilities how to positively affect the poor in developing countries. (Brown, Hall, 2008)

Livelihoods of the poor are affected in many different ways, both positively and negatively. Even though in the ideal world, tourism should foster cultural heritage of the country, the socio-cultural intrusion by tourists in the visited country is often stated as negative impact of tourism. For example, in some parts of the world, women and young girls or boys can be affected by sexual and other exploitation by tourists. On the other hand, raising awareness about development, different cultures and breaking prejudices is the positive effect. Nevertheless, the actual positive and negative impacts will very much depend on situation, people, time, location, and other factors. Studies concentrated on impacts of tourism on the poor have not come up with many generalizations as the poor are not homogenous group and impacts will be unevenly distributed reflecting different patterns of assets, activities, opportunities and choices. The most substantial benefits will be concentrated among few while negative effects and smallest benefits are to be experienced by the poorest from the poor. (Ashley et al., 2000)

2. TOURISM ALLEVIATING POVERTY IN RWANDA

According to the UN, Rwanda is endowed with excellent tourism assets for a small country. Tourism was identified as a priority sector to achieve development of Rwanda in the strategy 'Vision 2020'. Mountain gorillas, which can be now found only in two other countries in the world, give the country a special world attraction. (Spenceley et al., 2010) Tourists started to visit Rwanda more since the 1980s, however later due to the war the numbers plummeted. Only in 2003, the tourist activity recovered once again. In 2008, about 17 000 people visited the Volcanoes National Park (VNP), where gorillas are located in Rwanda. Nevertheless, there is more to tourism in Rwanda than gorillas. Besides VNP, there are two other national parks that offer range of wildlife and biodiversity. Rwanda has been also successful in attracting business and conference travellers from surrounding countries and the world, which is supported by increasing number of hotels, as well as planned construction of conference centre. (Nielsen, Spenceley, 2010)

How are the communities surrounding the VNP involved and benefit from the gorilla tourism? Firstly, local communities gain direct benefits from the employment by tourist enterprises. Rwandan-based NGO surveyed 18 hotels and in result found out that 49% of its staff were people from a poor background. In restaurants, 71% of the staff was from a poor background although they tended to have lower-level positions and earn less. Local people can also find job within the VNP, where most tourists are taken. The park employs around 180 people who work as guides, trackers and anti-poaching guards. Within them, 63 were unskilled employees, so the poorest from the community. Additionally, around 800 community members are involved in day-to-day management activities of the park and can get some temporary jobs.

Secondly, locals can benefit is the selling of food to the hotels. However, the farmers sell their products in the town market to traders, who then sell them to the hotel staff. Traders gain more money in this business than the farmer himself, who has no other choice usually than to sell to the trader at lower than the final market price. Thus, though the concept is pro-poor beneficial, there is space for improvements. Third way to secure financial gains is through joint venture. So far, there is only one JV in Rwanda, a luxury lodge near the park. It allows local community to benefit from tourism in four ways: equity in the tourism business, employment, supply of food and services, and dividends from the profit. As part of employment at the lodge, the staff gets trainings in hospitality and tourism. Also, the lodge buys local agricultural products and there are plans to develop other activities within the lodge as cultural centre and handicrafts sales. In his survey *Grosspietsch* found out that 21% of all tourists bought handicraft. (Spenceley et al., 2010)

An important component of transmitting the benefits of the tourism on the poor is the revenue sharing scheme, introduced in 2005. Accordingly, 5% of the tourism revenues from the park fees are injected into local community projects around the park. So far, the funds have been used for many projects, including such aiming at environmental protection, education, health care, water and sanitation, infrastructure and other areas. Education sector stands out the most, as most of the resources were headed there. Some of these money was also used to build the aforementioned high-end lodge. In the social sphere, significant achievements include construction of 10 schools with 56 classrooms, each with around 65 pupils. Thus, many children need no longer to travel long distance to the closest school. Furthermore, 32 water tanks were constructed. Also, activities like beekeeping and basket weaving were developed in 10 local associations. (Nielsen, Spenceley, 2010)

When it comes to the business tourism in Rwanda, we can say that the 4 and 5 star hotels in Kigali, where most of these kind of tourists stay, inject large sums of money into the local economy. It is mainly through wages of unskilled and semi-skilled workers, and purchase of Rwandan food. Approximately half of the staff are unskilled or semi-skilled people. Though the hotel restaurants buy large amounts of food, they usually buy it from rather big Rwandan farmers and not the smaller and poorer ones. Hotel souvenir shops are also part of strategy to gain income, yet again usually not the poorest benefit. However, business tourism should not be disregarded in the pro-poor sense, though smart ideas supported both by governments and private investors need to be put forward. (Ashley, SNV Rwanda, 2008)

How can Rwanda seize the full potential of pro-poor tourism concept? In the area of agricultural production purchase, it is important to improve the position of poor farmers, help them to increase quality, range of their products so they can increase their sale to the hotels. When it comes to education in hospitality and tourism, government must get involved more

in this sphere, as only by education more people from the poor background will be able to get jobs in tourism. Thus, hospitality and language courses need to be available to rural communities. Government should also try to promote innovative business model among hotels and include pro-poor tourism concept in the agreements. Moreover, the linkages of tourism need to be utilized, so web of partners working in the field ranging from farmers, craftsmen, dancers, lodge managers, kitchen staff, tour operators, NGOs and government need to be established. Studies on Rwandan tourism also advise to diversify the Rwandan product, as now prevails the overreliance on gorilla tourism. Diversification could include activities such as walking trails, farm visits, village tours and also activities such as picking tea, weaving baskets. Another advice is not to exclude the business tourism from the pro-poor focus.³⁰ So far, most attention was given to the pro-poor actions in VNP area but helping the poor to participate in the food purchase or get a job is as important in the rural area as in Kigali. (Ashley, SNV Rwanda, 2008)

Of course, there are also negative impacts of tourism in Rwanda on the poor. One is the destruction of natural environment in the park, which is connected not only to people but also to gorillas. Another aspect is the loss of access to natural resources and agricultural land. However, *Ashley* states that the main question is whether the opportunity costs of maintaining protected areas is outweighed or not by financial and other benefits that people receive from the ecosystem's use. (Spenceley et al., 2010)

3. TOURISM ALLEVIATING POVERTY IN THE GAMBIA

Another country, which benefits from the tourism is Gambia. As a LDCs country, the government's primary policy objective is to reduce poverty, which can only be done by channelling the resources to those sectors that have direct impact on the poor. The total budget allocates 59.2% to poverty reduction programs. Tourism is crucial for Gambia's macro-economy and the proportion of its contribution to national income is still increasing. (Mitchell, Faal, 2007) Tourism contribution to GDP of Gambia is projected to increase to 18% by 2020. (Ezeuduji, Rid, 2011) Gambia is rather small destination, but well equipped. Most of the tourism is located along the 10 km strip of the Atlantic coast, forming Tourism Development Area. However, almost 90% of all tourist accommodation is located in 20 largest hotels. When it comes to the purpose of tourists' visit, 99% list holiday as their reason. Nevertheless, the visitor numbers have been rising steadily since the 1980s. (Mitchell, Faal, 2007) For comparison, in 2012 around 175 871 tourists visited Gambia while in 2010 it was 91 000. (Nshimyumuremyi, 2014)

However, due to the purpose of tourist visits, there is high reliance on package tours, when tourists pay for flights, accommodation, catering in their home countries and thus denying much of the participation to the locals. Due to its concentration, tourism in Gambia is largely urban but now more tourist operators offer excursions to rural areas since cultural heritage and natural areas of various communities are considered a key selling value to tourists besides the beaches. Development of rural tourism should be the key for Gambia in years to come, as this encourages local poor communities to embark on initiatives which will directly lead to their socio-economic development through participation in tourism, while protecting their environment. Thus, partnerships between locals and NGOs were created in order to offer

30 Especially as the most tourists come to Rwanda for conferences or business purposes. The percentage was 35 of all tourists in 2008. (Nielsen, Spenceley, 2010)

rural tourism products and generate more income. Apart from rural tourism, a term cultural tourism is becoming also important for Gambia. When tourists visit local communities to experience local culture, it brings benefits to the people and also provide motivation to participate in these kind of activities. Nevertheless, more work needs to be put in creating stable partnerships between local communities, tour operators, property owners and policy makers. (Ezeuduji, Rid, 2011) The Gambia Tourism Development Master Plan aims at benefiting from all kinds of tourist activities and ensuring the spillovers from tourism to other industries. (Nshimyumuremyi, 2014)

Thus, how do the poor benefit from the tourism in reality? First of all, most obvious link is through their employment in the hotels. Hotels employ local non-managerial, un-skilled staff. Job places for these workers generate on average two-thirds of all the jobs in tourism in Gambia. Though these workers get lower wages, they can compensate it in the form of tips from tourists, which is said to be rather generous, especially in the high-end hotels on the coast. It is important to note that direct income does not only affect the worker but also his/her family, which is on average including 8.5 members in Gambia. Apart from benefits from accommodation sector, there is also the purchase of food and beverages by hotels and restaurants from the poor. As 70 % of the country's workforce is engaged in agriculture, this provides large opportunities how to increase the livelihood of the local communities. Gambia improved in this area a lot since in 1986, hotels stated that 65 % of foodstuff were imported while by 2006 hotels report that 45-50 % of all freshfruits and vegetables were locally supplied. However, there are still hotels which buy 90 % locally and others which do not buy anything locally. This sector is important for the poor as food is by far the largest component of what tourists spend in Gambia, as hotels usually provide only breakfast. The pro-poor impact can be also found in retail sales. The informal sector in retail captures half of all the expenditures and thus the transfer of resources from tourists to the poor is very large. Yet another way how tourists can connect with locals is through transportation and organized excursions out of the coastal hotel world. In this field, excursions organized by tour operators do not offer much chance for pro-poor development. (Mitchell, Faal, 2008)

How can these involvements of locals with tourists be ameliorated? In the accommodation sector, the recommendation is to increase taxes take; reducing seasonality of tourist demand; increasing wages for workers; and 'Gambianisation' of hotel management. Generally, the tax morality in tourist accommodation sector is rather low, of only 24 %, so it's important to increase this, as the funds could be used in poverty-reduction schemes. Secondly, although more and more workers from poor background are employed by the hotels, they are usually made redundant during the low-season due to demand volatility and seasonality. This affects negatively the poor not only in the particular period but also in general as the livelihood security is low. There is always space for increasing the wages and thus increasing the livelihood of the workers. Moreover, trade unions' formation should be facilitated. Government with NGOs should also work on strategies to include more women in tourism in Gambia, which is now dominated by men and studies show that the expenditure patterns of women's earnings have more developmental impacts as that of men. In agriculture, the 'Gambia is Good' initiative is strengthening ties between food producers and tourist industry. The programme achieved increase of incomes of participating households by up to five times. Also, NGOs should work continuously on helping small farmers to enter this market of hotel and restaurant supply chain. They should be also helping farmers to comply with food safety regulations, in order to prevent this being a barrier for their entering the market. In retail

sector, great deal of work was done by the Association of Small Scale Enterprises in Tourism, which helps in job creating and formalization of the informal sector to have better chances of entering the market. In transport sector, government should develop more favourable conditions for pro-poor excursions by working with local and international tour operators, include fiscal incentives or joint marketing arrangements. (Mitchell, Faal, 2008)

Apart from these recommendations and changes made, other initiatives were developed in order to enhance impact of tourism on the poor. There are 26 female fruit sellers on the Kotu beach, where many tourists go. In the beginning they were just walking around trying to sell something and tourists often felt hassled. In order to improve relationships with the customers as well as hotels in the area, a Code of Conduct was developed. Women now divide their shares of the beach and have a stall on the beach, from where they can sell the products. The stall helped them to improve relations with tourists. They estimate that their incomes increased by 50-60% as a result of change of style of conducting their business. Juice pressers have also created a Code of Conduct. Now the prices of juices are displayed on the stalls and it's estimated that their income increased due to the organizational changes. However, problems remain as sellers claim that tourist operators warn tourists about buying juices on the street, due to bad hygiene conditions. Sellers argue it is not true however, though admitting that lack of sanitation and access to clean water are still impediments to their business. Local tourist guides and taxi drivers, as mentioned earlier, also adopted a Code of Conduct, introducing licences for taxi drivers and to prevent bumsterng around the hotel, tourist guides have their own logbook system which monitors their work and also helps to evaluate their work by customers. Their income also increased thanks to this initiative. Code of Conduct was also adopted by craft workers in order to prevent hussling and bumsterng of tourists and create better relationship between tourists and hotels. It was successful and their incomes increased and craft workers were also invited by hotels to sell there. Additional 43 people gained jobs assisting on the crafts market working as assistants in the stalls. Moreover, the number of stall holders on the craft market who feel that their income is not sufficient to cover their basic needs dropped from 93.4% to 56.4%. (Bah, Goodwin, 2003)

CONCLUSION

Tourism is one of the possible tools for LDCs to be lifted out of poverty. Of course, not all countries are suitable and can use the full potential of tourism and its connection to development. However, as in the first chapter the definitions were established, I think we can say that the character of tourism allows it to be used as a tool for poverty reduction. Mainly, it can create strong spillovers and linkages with other sectors of economy. Though its leakages needs to be controlled. Another advantage is that it brings people to the product, so the tourists are very likely to contribute somehow to the local economy. Greater global understanding and consciousness is fostered by tourism and by travelling to LDCs people get aware of development issues, too. The relation between tourism and development is thus strengthened and we see that it really can be connected, as both tourism and tourists change.

The case of Rwanda proves that tourism can be used as a strategy in fighting poverty. The poor benefit from employment in hotels, restaurants and parks, and by selling their agricultural products to these facilities. Also, many tourists give donations and the joint ventures could help improve the poor' position. Great improvement is the revenue scaring scheme.

However, we can also see constraints for the poor, as the country relies mostly on the gorilla tourism, the benefits are projected only on the few poor communities located around the national park. Also, due to building of new facilities, local communities are losing the land around. Thus, the country should develop strategies to include business tourism more in the pro-poor schemes and also help farmers raise quality of their products so they can enter the industry. Education in tourism, languages is also important so more people can benefit from tourism.

In the second case study, the Gambia, benefits of the poor from the tourism are also illustrated. Most of the poor benefit from employment in hotels, restaurants, by selling their food production or craft products. There are successful programs in place, which help to improve relationships between local sellers and tourists. However, in order for them to benefit even more, educational programs need to be developed and tax collection improved. Moreover, women should be encouraged to get involved and more projects should be focused on promoting tourism to natural areas and cultural heritage sites, so the tourism doesn't bring benefits to the poor there while excluding the others. Moreover, most of the benefits are limited to the coastal area. Thus, it is important to promote more up-country ecotourism, cultural tourism, and excursions to the inlands.

In my opinion, the hypothesis given in the introduction is proven, as tourism in studied countries really improves livelihoods of the poor there, as well as the economy of the country as a whole thanks to spillover effects. However, to fully employ the benefits of tourism, governments together with NGOs must introduce more programs including the poor and helping them to be able to enter the industry. In both countries, benefits are largely enjoyed by the limited number of people, and so this needs to change by education, trainings offered and by not relying only on one segment of tourism. Nevertheless, studies concentrating on tourism as a way out of poverty are still lacking. However, I am confident that tourism can bring more benefits to the poor than drawbacks, when wisely implemented.

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THINKING AHEAD FOR SUSTAINABLE DEVELOPMENT: GENDER PERSPECTIVE ON THE CASE OF RWANDA

Maja Ladic

Abstract

While interpreting development through post-colonial theories, and taking post-2015 development agenda into account, this paper deals with gender dimension of the sustainable development context – on the case of Rwanda. It takes bottom-up approach through emphasising importance of good knowledge of the local context. Assuming that development policies and strategies are successful only when they have positive effects also on the most vulnerable and marginalized groups, this research focuses on house-girls in Rwanda. Ten representatives of this group, as well as eleven representatives of a control group, have been interviewed in 2014 and 2015. This paper presents their views on sustainable development and gender equality, and compares the picture that the two selected indexes measuring gender dimension present of Rwanda, with the actual situation on the ground.

Keywords: sustainable development, gender equality, Rwanda

INTRODUCTION

Rwanda is categorized as one of the least developed and at the same time one of the fastest developing countries in the world. It is also argued to be very successful at achieving Millennium Development Goals (MDGs), which are, in the light of post-2015 agenda, soon to be replaced by Sustainable Development Goals (SDGs). Especially MDG 3 and SDG 5 focusing on women's empowerment and gender equality are addressed by this paper.

On the basis of thorough field research in Rwanda, and six-year cooperation with a local women's organization, I observed that high estimations of some gender equality indexes do not comply with the empirical reality. Thus, I examine two indexes through lens of postcolonial theories, and compare the image they present with the situation on the ground.

Arguing that development policies and strategies are successful only when they have positive effects also on the most vulnerable and marginalized groups, this paper looks at

“development” from the bottom-up gender perspective. House-girls,³¹ as they are mostly called, were identified as the most vulnerable group in Rwanda. Usually they come from poor rural families, where they did not have the opportunity to finish their education or even attend primary school. Many are illiterate and unaware of their rights, thus they are poorly paid and often exploited. Many claim they have no options in life other than being house-girls.³²

I visited Rwanda eight times since 2009 and used personal observation method during each stay, while I conducted semi-structured interviews with house-girls working in Kigali, and representatives of local authorities as a control group within the research. As policy actors they (are supposed to) implement and communicate programs and strategies at the local level, and they are also the ones house-girls can turn to in case of a need. Thus, the research examines their understanding of sustainable development and gender equality concepts (as official opinion), and seeks differences and/or similarities with that of the house-girls.

1. LEARNING FROM THE PAST, THINKING AHEAD

In 1990s the development discourse changed, and aspirations for “economic growth” were replaced by the mainstream discourse of “poverty reduction”. As Amin (2009b) argues, the poor are not simply lacking, they are systematically impoverished by processes which are constantly reproduced. The rich countries continue to exploit other countries; the only difference is that in the past they did this in a more open way – by colonial conquest.

Postcolonial authors (Fanon 2010; Said 1995; Spivak 1988; 2007; Amin 1976; 2011; Young 2009; Mignolo 2000; Loomba 2009) argue that colonial power relations continue, and that the global West launched the term “underdeveloped” (South) to justify its economic expansion. Amin (2009a, 68–75) claims that the South only needs to dismiss the internalized sense of dependency, and realize that development aid is actually not about the West helping the South, but the other way around.

With the United Nations Development Program (UNDP) concepts of human development (Sen 1987; ul Haq 1995), and human needs and capacities are brought to the spotlight (UNDP 1990; Alkire 2010, 3–12). In 2000 the “MDG era” started and one could argue that for the first time different stakeholders in development cooperation field began to cooperate with the purpose to achieve MDGs by 2015 (UN 2000; Todaro and Smith 2011, 23). MDGs were often praised for holistically addressing the global poverty, but they were also often criticized for not being ambitious enough, for not addressing the most burning issues, for arbitrary setting the poverty line, and for time-limit actually having negative instead of positive effects on development. Like Sen (2013, 43) argued, “there was also no clarity or agreement on the ‘hows’ – processes, approaches and methods – as distinct from the ‘whats’ of goals and targets.” The fact that MDGs were not an initiative from the South, and that their main authors came from the West (Amin 2006) should also not be ignored.

In last couple of years the debates about the post-2015 development agenda were intense and MDGs are soon to be replaced by SDGs (UN 2015). SDGs do not concern only “develop-

31 I use the term “house-girls” and understand it different than “domestic workers”. Domestic workers do not necessarily live with the people they work for, while house-girls live in the households, and are available basically 24 hours a day to their “employers”.

32 House-boys are present as well in Rwanda, and share similar faith, however house-girls are still facing more issues.

ing countries” like MDGs, but rather the whole world. Some argue that SDGs will finish what MDGs started, and that with SDGs there is a shift from *top-down* to a more inclusive *bottom-up* approach. Post-2015 development agenda has to learn from the experience of the MDGs, not to repeat the same mistakes. As this paper focuses on gender dimension, respective MDG and SDG are further discussed below.

2. GENDER PERSPECTIVE

Gender inequality is a consequence of mass poverty and underdevelopment, which are consequences of imperialism, colonialism and neo-colonialism (Jain & Sen 2005, 81-83). Similarly, post-development and post-colonial schools see the problem in Western systems based on neo-classical economic theories, which are causing more poverty and inequalities in the world (Esteva 1992), increasing also gender inequality. According to UN (2000) gendered poverty is one of the biggest challenges of the “developing countries”. In 1970s the term “feminization of poverty” (Pearce 1978; Chant 2006; 2008) appeared, based on data showing that women represent 70 % of the poor people in the world.

Both, MDGs and SDGs incorporate women’s empowerment and gender equality, which are argued to be a precondition for development (Boserup 1970; UN 2013). MDGs failed to address the multidimensional nature of gender (in)equality – power relations, gender roles, laws, and multiple aspects of people’s lives. MDG 3 (Promote gender equality and empower women) and SDG 5 (Achieve gender equality and empower all women and girls) sound alike, however, apart from SDG 5 including *all* women and *girls*, we can spot more differences when we look at the targets.

Positive trends are seen in employment sphere, and the number of women in national parliaments is increasing (UN Women 2015), however, MDG 3, with its narrow focus, remains unachieved also due to deeply rooted traditional and stereotypical gender roles that are often supported by the institutional and legal structures. MDG 3 had only one target focusing on education, however women’s empowerment “requires agency along multiple dimensions – sexual, reproductive, economic, political, and legal” (Sen 2014, 13). SDG 5 proposes a range of targets covering these dimensions; now also adequate implementation, monitoring and funding schemes need to be put in place.

When thinking ahead for sustainable development – be it gender dimension or any other aspects of development – monitoring, evaluations, and data collection are important for preparations of new development programs, strategies and policies, as well as setting new goals and targets. Measuring gender (in)equality, gender gaps or gender disparities certainly helps raise awareness on gender related issues in development context, however indexes are mostly a Western construct and do not always take different local contexts and country’s specifics into account, thus they should be critically assessed.

3. MEASURING GENDER EQUALITY IN DEVELOPMENT CONTEXT

In the last 20 years numerous indexes measuring (human) development and gender (in) equality have been developed and accepted as universal, global, and objective. However, some of the critics (Permanyer 2013; Klasen & Schüler 2011) argue that indexes may leave

out some important dimensions or include irrelevant ones for a specific country, and that the methodology behind the constructed indexes can not only be very confusing but sometimes also problematic, thus one needs to be careful when interpreting results of a certain index. To be able to estimate if indexes reflect the real situation on the ground, a good knowledge of the local context is necessary. I question also whether the indexes can tell us how certain phenomena influences people's lives – especially the most vulnerable groups. This is difficult to measure with quantitative methods, therefore I based the empirical part of my research on qualitative ones – semi-structured interviews and personal observations in the field.

Following two indexes have been selected and analyzed on the case of Rwanda: the **Global Gender Gap Index** (GGGI), introduced by the World Economic Forum (WEF) in 2006, and the **Social Institutions and Gender Index** (SIGI), introduced by OECD in 2009.

GGGI looks only at gender gaps; it does not take the stage of a country's development into consideration. This means that least developed countries with very low income could rank high on GGGI if the gender gap is small – which is exactly the case of Rwanda. GGGI measures the consequences of inequalities – the gender gap, in four dimensions: economic participation, educational attainment, health, and political empowerment (WEF 2014). OECD takes a different approach and focuses on causes of inequalities – discriminatory social institutions: formal and informal laws, attitudes and practices that restrict women's access to rights, justice and empowerment opportunities, focusing on five dimensions: discriminatory family code, restricted physical integrity, son bias, restricted resources and assets, and restricted civic liberties (OECD 2012; 2014).

On SIGI Rwanda ranks quite high: 28 out of 86 countries in 2012, and 44 out of 108 in 2014. This is due to high evaluation of the last dimension “restricted civic liberties”, while the lowest scores are in “restricted resources and assets” dimension, showing that women still face difficulties in accessing property, land rights or bank loans (OECD 2015). GGGI included Rwanda in 2014 measurements for the first time, and surprisingly, with the 0,785 score Rwanda ranks 7 out of 142 countries, joining the group of mostly Northern European countries in the top 10 (WEF 2014), which seems like a paradox. Rwanda ranks so high especially due to indicators measuring labor force participation, enrolment in primary school, and number of women in the parliament (WEF 2014).

4. RESEARCH BACKGROUND AND THE LOCAL CONTEXT

Rwanda is one of the least developed (UNDP 2013, 150) yet one of the fastest developing countries with the highest percentage of women in the parliament in the world. After the 1994 genocide, majority of the population in Rwanda were women, who took over work in numerous spheres that were considered as predominantly male. I selected Rwanda as a case study because of my six-year cooperation with a local women's center, located in the capital Kigali, through which I had access to various information, documents, and contacts.

The empirical part of my research is based on the personal observation method and semi-structured interviews with two groups. I conducted interviews with 11 local leaders, four male (31 to 53 years old) and seven female (21 to 62 years old), coming from Nyamirambo in Kigali,

in August and September 2014. In June 2015 I interviewed ten house-girls (18 to 24 years old), coming from different rural areas in Rwanda, but working in Nyamirambo in Kigali.³³

In order to better understand the connection between the two selected groups – house-girls and local leaders – one should be familiar with the Rwandan governance system. The country is organized in four provinces plus Kigali city, further in 30 districts, 416 sectors, 2,148 cells, and finally 14,837 villages (NISR 2015).³⁴ Each village (*umudugudu*) has around 20 leaders, five of them forming a committee, and one of those being the chief of the village. These local leaders, representatives of the lowest level of the hierarchical governance pyramid, are in daily contact with people living in their *umudugudu*, and they are the first to be approached in case of a need. They play an important role in people's lives, especially in lives of the house-girls, who usually do not have a social network of their own. Local leaders are also the ones to implement and communicate (development) policies and programs at the local level, and to inform people about them, thus it is important for this research to analyze how they understand gender and development concepts.

5. CRITICALLY ASSESSING THE MAIN DIMENSIONS MEASURED BY THE SELECTED INDEXES

Political dimension

Rwanda scores high for having 64 % of **female parliamentarians**,³⁵ and about 40 % of women in ministerial positions (WEF 2015). The high percentage of women in national politics is mainly the consequence of the political will, the quota system, the mobilization of women, and the specific election system in Rwanda.³⁶ Indexes should take all this into account, because it differs from country to country and has a significant impact on the results. However, political representation component of indexes is problematic, because to reach gender parity, percentage of women at all levels of politics (national and local) should reflect the percentage of women in the population.

The absence of any indicator capturing the gender gap at the **local level** is clearly a drawback as there are often huge differences between the national and local levels of the government, which is also the case in Rwanda. Majority of interviewed men however saw no issues, while women argued that people at the local level still do not believe that a woman could be a good leader. Women are rarely the chiefs, instead, they are mostly responsible for

33 I faced some limitation during my research: I do not speak the local language Kinyarwanda, thus interviews were done with the help of translators. I am aware of the downside of this, as well as my identities (young, white female, European, coming from a former socialist country, PhD candidate, researcher, feminist, leader of a few development projects in Rwanda) which also influenced the research. Without my friends, informants, and translators my research would not have been possible.

34 Village in this context does not mean a village in the rural area; it means the smallest administrative unit.

35 High number of women in the parliament undoubtedly contributes to this result, because Gender related Development Index (GDI), which didn't include this indicator, ranked Rwanda much lower, 140 of 157 countries (UNDP 2007) and 139 of 155 countries (UNDP 2009).

36 Parliamentary elections are held in two days. On the first day 30 % of women guaranteed by the quotas are elected, and only women are on the list. On the second day the remaining 70 % of the members of the parliament are elected, and these seats are not reserved for men only. Therefore, if half of the seats on the second day are won by women, that means 65 % of female parliamentarians in total, which is almost the Rwandan reality.

social affairs, health, hygiene and education. Majority of house-girls said it is more important who are the leaders at the local level, since they can only approach them, and most of the house-girls did not know that in Rwanda there are many women in the national politics. This confirms the argument that indexes – to present more accurate picture – should include the indicators measuring political participation also at the local level of governance, where the figures could be completely different compared to the national level.

Economic dimension

Rwanda gets a good score on **labor force participation** indicator of GGGI because more women than men participate in the workforce. However, women still earn around 25 % less than men, while two thirds of all legislators, managers and senior officials are male (WEF 2015). SIGI, on the other hand, looks at the access to land and non-land assets and financial services. Despite the legal possibility and declarative gender-equality in this field, women in practice still face difficulties in accessing land and other property, and majority is ineligible to get bank loans (OECD 2015). Large majority of rural and poor urban women do not even have bank accounts – only one out of ten interviewed house-girls had one, while others said they do not use any financial services, except sometimes “mobile money”.³⁷

The **informal sector** and unpaid domestic or care work, which say a lot about gender (in) equality, are not included in selected indexes. Often women represent the majority of workers in the informal sector, and do most of domestic and care work. The informal sector is difficult to measure, since there are no contracts and no official records to be accounted for. However in Rwanda, with its very detailed pyramidal governance structure, this might actually (to some extent) be done. Local leaders explained about **ubudehe** – a government program for categorizing people in four groups according to their socio-economic status. The income is just one of the indicators evaluating the situation of a certain family or a household. The local leaders, who are in charge of **ubudehe**, look at the job one has, the property, the price of the rent, the number of children and type of school they attend, number of meals a family has per day, presence of house-girls or house-boys, etc. The variety of variables used in **ubudehe** reflect also the informal sector, thus we can conclude that also GGGI and SIGI could (and should) include such indicators when measuring the economic dimension. Even if such data cannot be obtained from the official statistics, when taking local specifics into account, in the case of Rwanda it is obvious, that (some) data can be gathered.

Educational dimension

Rwanda scores high on GGGI educational dimension due to the **enrolment rate** into primary school, which is higher for girls (90 %) than boys (87 %), however **illiteracy** is still higher among women (30-40 %) than men (less than 30 %) (WEF 2015). Literacy-related skills are necessary to escape out of poverty (Permanyer 2011), however, SIGI does not include any indicators on education. In GGGI the data for the enrolment rate in secondary education is lacking, thus this index does not tell us how many boys and girls continue their education, and how many **drop out** in primary school. Data on enrolment in tertiary education only states there are around 25 % more male than female students (WEF 2015).

Four house-girls have not attended school and were illiterate, three dropped out in primary and three at the beginning of secondary school. The most common reason for girls'

37 Saving money on their sim card or sending money to their family in the rural area through the mobile operator.

drop-out is poverty or pregnancy, which proved to be the case also among the interviewed house-girls. One of them explained she had to drop out of school when she became pregnant. She had no option but to keep the baby. Due to the family situation she had to move to Kigali and become a house-girl, while leaving her baby with another family. She sees her child once every two months. When asked about the father of the child, she said he is now a University student and does not help in providing for the child.³⁸

Most of female local leaders listed education as important part of sustainable development, while none of the male leaders mentioned it on their own. All of them said that in Rwanda all children, boys and girls, now have an opportunity to go to school. However, one of the informants made a very good point: "Now they are saying that all people are going in school. Yes, they are going in (sic) school, but are they getting enough knowledge from those schools?"³⁹ Indexes should include also data about the quality of education – the type of school (public or private), the price of school fees, the number of students in class, the achievements and the drop-out rate of male and female students. The wages of teachers and professors in public and private schools should be evaluated as well.

(Sexual and reproductive) health dimension

The GGI includes only sex ratio and healthy life expectancy indicators which do not tell us much about this dimension. SIGI, on the other hand, includes "restricted physical integrity" and "son bias" categories, which place Rwanda in the medium group of evaluated countries (OECD 2015). Indicators look at laws and attitudes towards domestic violence, violence against women, sexual harassment, rape, female genital mutilation and reproductive autonomy, missing women, and fertility preferences.

Practices and attitudes can tell us more about the actual situation in the field than the laws. Respective laws in Rwanda address spousal violence, marital rape, **sexual harassment**, and sexual abuse of children. What is worrying is that results of studies show that 56 % of women have experienced **physical and/or sexual violence** by an intimate partner at some point in their lives, that 60.8 % of women who experienced violence never sought help, and that 56 % of women believe that wife-beating is justified in some cases (OECD 2015).

The fact that **abortion** is still illegal in Rwanda means that women and men do not have the same opportunities in life. Unplanned pregnancy is often the reason for girls to drop out of schools, while the fathers in most cases uninterruptedly continue their education. Since not all of the interviewees spoke openly about abortion, I can share only the impression that local leaders were more reserved towards the abortion than house-girls, whereas most of them referred to the religion. "We are very religious. Christians or Muslims are thinking [the abortion] is horrible. /.../ [P]eople believe in God and they believe this is killing people. You know, in the church they think you can have all the children God gives you – God will take care of them."⁴⁰

Besides data on the abortion, indexes should include also indicators on fertility rate, use of contraception, and data on involvement of (both) parents in children's lives.

38 Interview with house-girl Chantal in Kigali on June 14, 2015.

39 Interview with informant Mugeni in Kigali on September 4, 2014.

40 Interview with local leader Frank in Kigali on August 26, 2014.

Family life dimension

SIGI includes “discriminatory family code” dimension, while GGGI completely ignores this field. However neither of the selected indexes includes indicators relevant to both interviewed groups: **family relations, division of roles and decision-making within a family**. Especially female local leaders and house-girls understood gender equality in this sense. One male leader agreed family life is important indicator of gender equality: “If I’m married to someone who is not educated, that means there won’t be gender equality. If I’m the one with a job, education, I’m helping my kids with homework, I’m taking all the decisions. My wife is just cooking, she is just there.”⁴¹

According to Rwanda’s **Family Code**, 21 is the minimum age for marriage, and polygamy is forbidden, however, especially women that did not attend school or dropped out in primary school, often get married before they are 21, and in practice many still form informal marriages or family units. The inheritance law applies only to legal marriages, excluding customary and **polygamous** ones. In Rwanda, around 15 % of women live in informal unions and 8 % in a polygamous union (OECD 2015). These women have no legal rights.

Three (of four) male leaders had sexist views on women, and put all the responsibility for unplanned pregnancies on women. This clearly shows the lack of understanding of the development and gender equality concepts, and also mutual connections between all addressed dimensions. A realistic picture of one country could be presented by indexes which incorporate (at least) all these dimensions.

CONCLUDING REMARKS

Based on the interviews, it was found that the two groups understand and interpret sustainable development and gender equality differently. Local leaders mentioned mainly economic development, foreign investment, business and infrastructure, women also education, while house-girls were referring to their own personal development, education, progress in life, and finding a better job. All house-girls said that men and women were equal in Rwanda, however later in the interviews their position changed showing nuances and contradictions. Also local leaders (with an exception of one woman) agreed that men and women in Rwanda have the same opportunities for education, that women can now inherit land and property and do all types of jobs, which proves they are equal to men. Gender equality and development in Rwanda (or anywhere else) should be estimated through the way all women are living their lives in the whole country, which supports my assumption that development programs and strategies are successful only when they positively affect also the most vulnerable and marginalized groups in the country.

Analyzing the two selected indexes and the indicators that are measuring gender dimension, and comparing the results for Rwanda with the personal observations in the field and the information obtained from the semi-structured interviews with the two groups, I conclude that indexes do not present the full or real picture of Rwanda. In order to do so, additional (or different) indicators should be included in indexes, especially the ones pointed out in this paper, reflecting circumstances of local politics, informal sector, quality of education, sexual and reproductive health, and family life.

41 Interview with local leader Frank in Kigali on August 26, 2014.

Gender dimension of sustainable development is included in post-2015 agenda and framed in SDG 5, which is a lot more elaborated than MDG 3 was, however, like Sen (2013, 48) argues, “[p]rogress towards gender equality will depend on whether the larger development framework addresses central issues such as the growing inequality, informalisation and precariousness of work and incomes.” Another important thing is to bring SDGs closer to the general public, to make them more understandable and to gain ownership over them. It seems like this was one of the downsides of MDGs as well: “If you come to me as the chief of the village and ask me about MDGs... Of course you can explain it, but to understand... It’s for people who are educated.”⁴² People need to understand sustainable development in order to support it or contribute to it.

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42 Interview with local leader Frank in Kigali on August 26, 2014.

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ZIMBABWE – POSKYTOVÁNÍ ROZVOJOVÁ SPOLUPRÁCE V NEDEMOKRATICKÉM POLITICKÉM PROSTŘEDÍ

PhDr. Monika Nová

Abstrakt

Příspěvek s názvem „Zimbabwe – poskytování rozvojové spolupráce v nedemokratickém politickém prostředí“, poukazuje na rozvojovou činnost v republice Zimbabwe a to z pohledu místních obyvatel. První část má teoretický a interdisciplinární charakter, které jsou podloženy historickými, politologickými, sociologickými vědy. Druhá část představuje výsledky empirického výzkumu, získaného dotazníkovou technikou a zdůrazňuje rozvojovou spolupráci i v kontextu lidských práv. Autorským záměrem je poukázat na téma porušování lidských práv v zemi, jako jeden z problémů, které jsou překážkou pro rozvojovou spolupráci.

Formulujeme možnosti a směry, jak by mohla být rozvojová pomoc v Zimbabwe efektivně realizována. Na závěr vyslovujeme finální konstatování a uvádíme doporučení do praxe.

1. ÚVOD

Předkládaný článek se zabývá tématem lidsko-právním, a to v souvislostech s rozvojovou spoluprací ve státě Zimbabwe z pozice místních občanů. Dále předkládáme vybrané výsledky dotazníkového šetření, které tematicky korespondují s názvem příspěvku.

Skutečná situace v této zemi – politická, bezpečnostní, lidskoprávní a především sociální není široce známa. V cestě stojí zejména vojenský režim, odmítající spolupráci nebo možnost výzkumu a publikování.

Výzkumy v Zimbabwe jsou v současné době spojeny s bezpočtem problémů. V první řadě je třeba uvést, že jakýkoliv výzkum nebo sběr dat v Zimbabwe balancuje na hraně zákonnosti a statutem *contra legem*. Síť policejních udavačů z lidu, policistů v civilu či politických pracovníků vládnoucí strany s názvem ZANU PF je velmi hustá, a proto každá takováto práce s sebou nese riziko obvinění ze špionáže. Současný politický režim výzkumnou činnost odmítá ze strachu z následků (např. sankce za porušování lidských práv, upozornění na skutečný obraz země ve světových médiích).

Všudy přítomná atmosféra strachu, a tím i malá ochota ke spolupráci vypovídá na výzkumné dotazníkové šetření je největší překážkou.

V zemi autoritářsky vládne kontroverzní prezident Robert Mugabe a je založena na pravidlech jednoho muže, který je u moci od vyhlášení nezávislosti země, tedy od roku 1980. Jeho

znarodňování zemědělské půdy patřící bělochům vyvolalo v zemi vážnou hospodářskou krizi a uvrhlo Zimbabwe do hyperinflace. Přestože bývá často obviňován z porušování lidských práv v zemi i za ekonomické zruinování někdejší „obilnice“ Afriky, jeho někteří příznivci v něm stále vidí hrdinu boje za nezávislost. Je však stále více obyvatel v této zemi, kteří mají strach a tiše nesou ponižování a porušování lidských práv. Kritiku Západu i mnohých afrických států Mugabe ignoruje, za příčinu všeho zla v zemi označuje bělochy a bývalou koloniální mocnost Británii. Dle vyjádření, prezidenta Roberta Mugabeho jsou bělošští farmáři, novináři, odboráři a zahraniční obchodníci „prodejní zrádci“ a zasluhují tresty (ČTK, bva, [Cit.2015-09-09]).

Autorka tohoto příspěvku do země jezdí pravidelně a to na pozici zdravotně-sociálního pracovníka v rámci projektu české neziskové organizace poprvé. Byli jsme tak schopni lépe interpretovat odpovědi respondentů.

Autorským záměrem je i hledáme odpovědi, zda Zimbabwe potřebuje více než zahraniční pomoc, změnu politické situace v zemi.

1.1 Politologický aspekt

Z hlediska výše uvedeného názvu příspěvku uvádíme tyto skutečnosti a témata.

Politologický aspekt – *Legislativa a atmosféra strachu*

Všude přítomná represivní opatření cíleně budují atmosféru strachu. Policejní check-pointy, síť civilních udavačů a vládních agentů ZANU PF udržuje společnost v napětí.

Legislativa sleduje politické zájmy vládnoucí strany ZANU PF a jeho prezidenta – Roberta Mugabe, vůči ostatním je represivní. Veřejný život je direktivně řízen restriktivními zákony. Zejména se jedná o dva právní akty a sice *Public Order Security Act*, upravující svobodu projevu, informací a shromažďování a *Acces to Information and Protection of Privacy Act*, řešící otázky přístupu k informacím, radiového a televizního vysílání. Tyto zákony sice např. většinu setkání aktivistů umožní, nicméně jsou pod přísným dohledem úředníků ZANU PF a pokud dojde k protirežimní rétorice, tajná policie ji vystupňuje, aby zadali příležitost zásahu policie a rozeznání setkání. Noviny a televizní vysílání jsou přísně státní. NANGO a také další publikace *Civil Society Monitoring System* sice hovoří o pokusech soukromých vydavatelů, avšak tyto jsou stíhány a likvidovány (Nango, 2012).

Dalším aspektem, který režim bezesobitky využívá, je malé právní povědomí obyvatelstva a korupční prostředí, spočívající v přemíře předpisů. Toho využívá policejní sbor, místní samosprávné úřady (*local authorities*) na úrovni provincií či měst k šikaně a vynucované korupci. Policie se stává takřka všemocnou a své pozice hojně využívá. Zákony jsou velmi složité a vyhlášky se překrývají, tudíž o skutečném znění téměř nikdo neví. Kromě toho existuje nepřehledné množství příkazů, týkajících se povolení. A nesmí se zapomenout ani na zvykové obyčejy.

Z toho vyplývá malá ochota obyvatel ke spolupráci mezi sebou. Obyvatelé mají strach, bojí se sebe mnohdy navzájem. Obavy z udavačů jsou tak silné, že ve městech je např. zákaz focení a natáčení. Jméno prezidenta se nevslovuje nahlas, o politice se nehovoří. Nedůvěra opadla jen u lidí, kteří nás znali delší dobu a troufli si říct víc.

Policie jako nástroj útlaku kritizuje mnoho dokumentů. Obávají se jí téměř všichni obyvatelé a nikoliv bezdůvodně; udání většinou nejsou prošetřována, ale udání lidé jsou uvězněni a bez soudů zadržováni tak dlouho, jak uzná policejní velení za vhodné. Na problém upozorňuje řada dokumentů, organizací mezinárodního charakteru, nicméně situace namísto zlepšení stagnuje. „Existuje celá řada policejních jednotek, např. dopravní policie či policie turistická. Mezi její oficiální úkoly patří ochraňovat turisty před obtěžováním, více méně jde o vládní agenty

či policisty, přímo napojené na tajnou policii takže běžný občan i turista se setkává dennodenně s tajnou policií.“ (Nová, 2014).

Jeden z typů etických dilemat, kterými mnohdy musí čelit mezinárodní nevládní organizace, nadace, charitativní organizace atd. je skutečnost, jak spolupracovat s nedemokratickou vládou (Bell, Clarens 2004). Je to dilema nejvíce pro organizace typu Amnesty International nebo Human Rights Watch.

„Rozvojová práce má v sobě také lidskoprávní dimenzi. Proto je tedy nevyhnutelné pro pracovníky v této oblasti, aby dokázali rozeznávat její praktickou i teoretickou rovinu na mikro- a mezo-, makroúrovni“. (Žáková, 2012)

1.2 Přijímaná a poskytovaná rozvojová pomoc

Vzhledem k politické situaci byly projekty rozvojové pomoci Zimbabwe ze strany států EU a USA výrazně utlumeny či zcela pozastaveny. EU v roce 2002 zavedla tzv. vhodná opatření podle Dohody z Cotonou, čímž byla přerušena přímá rozvojová spolupráce s místní vládou. Tento stav trvá dosud. Země je přesto příjemcem značné rozvojové a humanitární pomoci, poskytovateli jsou však většinou mezinárodní agentury či zahraniční nevládní organizace.

Dohoda z Cotonou je komplexní dohodou, která zahrnuje i další aspekty vzájemných vztahů. Evropská unie se snaží ve vzájemných vztazích prosazovat, princip kondicionality, který podmiňuje poskytnutí rozvojové pomoci zlepšováním stavu demokracie, právního státu a ekonomickými reformami v zemích Afriky.

V Zimbabwe je v současnosti realizována jak nevládní pomoc, tak i vládní pomoc.

Rozvojová spolupráce rozlišuje tři typy spolupráce:

Kromě humanitární pomoci je to nevládní pomoc (Charity based aid), je vedena charitativními a neziskovými organizacemi a snaží se o stálejší a dlouhodobější dopady rozvoje. Do této skupiny řadíme projekty, kdy neziskové organizace budují školy, nemocnice nebo se finančně podílí na rozvoji daného území). A v neposlední řadě je to mnohdy kritizovaná vládní pomoc pro země s diktátorským režimem – jedná se o oficiální rozvojovou spolupráci (systematická pomoc), která je realizovaná formou dlouhodobějšího rázu, kdy bohaté vlády poskytují finanční podporu vládám chudým nebo tyto peníze transferují vládě přes Světovou banku či jinou mezinárodní organizaci.

Z hlediska účinnosti a efektivnosti je nejlépe hodnocena právě nevládní rozvojová pomoc, kterou poskytují neziskové a ziskové organizace a na které se nepodílí přímo stát ani jiné mezinárodní instituce. Neziskové organizace vytváří zisk, který je vrácen zpět společnosti formou, která podporuje jejich misi a cíle (Salmon, 1996).

2. METODY

Ve výzkumné části rigorózní práce jsme položili důraz na zjištění, adresných potřeb respondentů z náhodného statistického výběru z klientů v dané lokalitě.

Výzkumná část, její zpracování a vyhodnocení údajů má kvantitativní charakter. Rozhodnutí se pro námi zvolenou metodu výzkum bylo podmíněné, že nám umožňuje manipulovat s pevnými číselnými hodnotami, numericky popisovat rozsah, případně podmíněnost jevů. V neposlední řadě nám dává možnost, poměrně vysoko přesného a jednoznačného vyjádření.

2.1 Výzkumný výběrový soubor a sběr dat

Respondenti byli vybíráni náhodnou selekcí z místního obyvatelstva. Věkové rozpětí je 18-52 let z provincie Midlands.

Realizace výzkumu probíhala ve městě Gweru a Kwekwe a jejich přilehlých oblastech, Instrumentem byl dotazník. Při rozdávání jsme vždy dbali na to, aby byl dotazník vyplňován samostatně bez působení a ovlivňování druhých osob. Každý byl vyplněn individuálně. Celkově bylo připraveno 200 dotazníků, 160 z nich je relevantních pro výzkum. Někteří respondenti odmítli po zhlédnutí otázek dotazník vyplnit nebo uvedená data byla nečitelná.

3. VÝSLEDKY

Výsledky jsme potvrdili výpočtem nebo vyvrátili. Správnost průběžných výpočtů chí-kvadrátu jsme ověřili výpočtem na PC; MS-EXCEL, přes statistickou funkci CHTEST. Vypočítali jsme p – hodnotu. Její pomocí jsme ověřili správnost průběžného výsledku výpočtu chí-kvadrátu, tj. potvrzení, či nulovou hypotézu opravdu zamítneme nebo ne.

Z důvodu publikace v dotazníku, který je limitován počtem stran budeme uvádět pouze procentuální vyjádření s autorským komentářem. Taktéž vyberme jen některé výsledky výzkumu, které považujeme za zajímavé, vzhledem k názvu konference a tematického publikování do sborníku.

Z dotazníkového šetření nám vyplývá, určitý strach z vládní moci a respondenti nám také udávají, že v rozvojové pomoci postrádají ochranu lidských práv, především tuto skutečnost uvádějí muži.

Dále můžeme tedy konstatovat, že obě dvě genderové skupiny se více bojí vládní moci, než přepadení a fyzického útoku. Ze 72 mužů nám odpovědělo 58 respondentů, že se bojí vládní moci. Což procentuálně činí až 80,6 %.

Na stejnou otázku nám ze 72 žen kladně odpovědělo 22, což je 30,6 %. Z čeho můžeme konstatovat, že je strach z vládní moci v reálném v životě obyvatelů Zimbabwe,

Na základě naší osobní zkušenosti s pobytem v této zemi si dovoluujeme konstatovat následující tvrzení. Dokud nebude odstraněn diktátorský režim prezidenta Roberta Mugabe, půjde jen ve vládní pomoci o tzv. transfer peněz od vlády ze zahraničí (v dobré víře zaslané, že jejich peníze jdou do chudých oblastí, dětem atd.), ale jedná se o přesun peněz k vládě Zimbabwské, která s těmito penězi nakládá úplně jiným způsobem a směrem.

Zdůrazňuje to také výsledek organizace Freedom House. Státy ve kterých nejsou dodržována, základní politická práva a základní lidské svobody jsou široce systematicky popírány a označují se dle indexu jako „nesvobodné země“ („Not Free Country“). Zimbabwe bylo ve zkoumaném období (2008-2014) mezi kvalitativně nejhoršími čísly stejně jako v předchozích letech bylo označeno jako země nesvobodná.

Položme si tedy otázku: „Je poskytování rozvojové pomoci potřebnější než politické změny v zemi?“

Ekonom Petr Bauer tvrdí, že mezivládní pomoc na rozvojové projekty se často mění v nezamyšlený přesun peněz, od lidí z bohatého světa, směrem ke královsky bohatým jedincům (představitelům politické špičky) ve světě rozvojovém. „Příjemce mezivládní pomoci v cílové zemi je opět vláda. Mezivládní podpora je de facto podporou této vlády.“ (Bauer, 1998). S těmito názory Petra Bauera se také ztotožňujeme na základě osobní zkušenosti z rozvojových projektů a pracovní stáže na českém zastupitelství v Harare.

„Je běžné a dalo by se říci, že v současné době v Zimbabwe jistým pravidlem, že peníze místní vláda (peníze, které získá ze zahraničí na rozvoj a pomoc) nevydává na tyto účely. K lidem se tak dostává pomoc především, prostřednictvím individuálních dárců, zahraničních nevládních organizací a nadací, kteří do země osobně přijíždějí a svůj záměr pomoci realizují na místě, jedná se tedy o jednu z forem rozvojové spolupráce – nevládní pomoc.“ (Nová, 2014).

Respondentům na současné rozvojové pomoci chybí, že jim nedává peníze, jednoznačně to uvádějí muži i ženy. Ve věkové kategorii nad 35 a více, jde také než o peníze a jídlo také o ochranu lidských práv. I přes tento uvedený fakt, nám vychází i napříč naší dlouholetou empirickou zkušeností v rozvojových projektech, že respondentům od rozvojové pomoci chybí to, že nedává peníze.

Tímto také poukazujeme na neznalost myšlenky rozvojové spolupráce, tzn. o její podstatu a záměrem.

A jakou pomoc, by respondenti nejvíce ocenili od budoucích rozvojových projektů? Otázku jsme vyhodnocovali na základě dotazníkového šetření a vypovídá, že obyvatele tohoto státu by ocenili v budoucnosti, kdyby dostávali od rozvojové pomoci, peníze v hotovosti. Dotazníkové šetření nám dále ukazuje, že lidé by si pro sebe přáli od rozvojové pomoci: dotykové mobilní telefony, televizi, jízdní kolo, digitální fotoaparát, boty značka Adidas a další materiální věci, které jsou typické pro dnešní dobu.

V dotazu na zaměstnání nám 81,8 % žen a 55,6 % mužů nám uvádí, že je doma a způsob obživy je širší rodina. Pojem „širší rodina“ byla uvedena záměrně, jelikož je to realita a fakt běžný v Zimbabwe. Typický příklad, např. muž i žena je doma a peníze jím poskytuje bohatší příbuzný i vzdálený. Poukazujeme tedy na poměrně velkou solidaritu mezi příbuzenskými rodinnými vazbami. Muži i ženy, kteří neuvdli, že jsou doma a živí je širší rodina – tak jde i o zaměstnání, ale spíše o způsob obživy typu: drobného prodeje, např. zeleniny, ovoce,

drůbeže převážně u silnice. Nejedná se tedy o zaměstnání v pravém slova smyslu, ale peníze na obživu rodiny a chod domácnosti si zajišťují tímto způsobem, mohli bychom konstatovat, tzv. formou „šedé ekonomiky“ bez jakýchkoliv dokladů o vydávání účtenek.

V rámci šetření, jsme se našich respondentů ptali, zda využívají rozvojovou pomoc. Zpracováním výsledků jsme zjistili zajímavou skutečnost, že respondenti obou pohlaví do 35 let několika násobně využívají rozvojovou pomoc, než respondenti nad 35 let.

4. DISKUZE

V práci se také zamýšlíme nad směřováním rozvojové spolupráce a její pomoci z rozvojových projektů v Zimbabwe. Souhlasím s tvrzením ekonomy Hynka Fajmona, že rozvojová pomoc je pouhým doplňkem, který by měl být pouze v případě humanitárních katastrof. Nepředstavuje řešení problému hladu a chudoby.

Stěžejní téma rozvojové spolupráce (a to nejen v Zimbabwe) je bezplatná pomoc a její úskalí, tzv. dávání věcí zadarmo.

Z našeho dotazníkového šetření jasně vyplývají fakta, že obyvatelé využívají rozvojovou pomoc a vědí o této formě pomoci. Na současné pomoci jim však chybí peníze. V budoucnu by od rozvojové spolupráce ocenili, kdyby poskytovala, kromě výše zmíněných peněz, taktéž věci materiálního charakteru. V podstatě je jedno, co dostávají hlavně, že je to zadarmo.

Apelujeme tedy nad faktem, určité nevědomosti obyvatel, co je předmětem rozvojové spolupráce, co je jejím smyslem a podstatou.

Naše pracovní zkušenosti z rozvojových zemí nejen ze Zimbabwe (dále Haiti, Uganda, Keňa, Zambie, Paraguay, Kambodža) si dovolíme si naprosto souhlasit s tímto tvrzením: „Dochází-li k přírodním katastrofám, jako jsou hladomory, zemětřesení nebo epidemie, vzniká přirozená, dobrovolná solidarita mezi lidmi. To je v pořádku. Filantropie je však pouze „první pomoc“, která se poskytuje před příchodem lékaře. Věřit, že bezplatná pomoc je nositelem rozvoje, znamená odsuzovat chudé země k tomu, že nezaznamenávají vůbec žádný rozvoj. Bezplatná pomoc může krátkodobě povzbudit, ale dlouhodobě nic neřeší. Bezplatná pomoc vytváří – nebo alespoň zachovává – závislost“. (Loužek, 2009).

Na základě osobních zkušeností, podpořené taktéž naším vlastním výzkumem v této práci, vidíme způsob efektivního východiska pomoci, v tzv. přímé a adresné pomoci ke konkrétním obyvatelům, obci, komunitě, škole, skupině dětí atd. To znamená, že soukromé podpůrné aktivity jednotlivců, nadací, neziskových organizací ze zahraničí jsou cíleny adresně, směrem k cílové skupině obyvatel v Zimbabwe.

5. ZÁVĚR A DOPORUČENÍ DO PRAXE

Především bychom chtěli upozornit, že se jedná o zemi s diktátorským režimem a velkým porušováním lidských práv.

Stěžejní východisko pro současné i budoucí směřování po zodpovězení výzkumných otázek, doplňujících otázek a pracovních i statistických hypotéz vidíme ve formě spolupráce.

Pokud chceme dělat rozvojovou práci v Zimbabwe tak, aby se dostala ke konkrétním příjemcům, musíme pomoc realizovat osobně na místě a dohlížet nad projektem. Zasílání peněz nebo peněžní pomoc, prostřednictvím zimbabwských vládních organizací je neefektivní. Jde o příliš peněz vládě, která je nepoužije na naši adresovanou pomoc. Sbírkový typ oblečení, hračky, dále darované nové věci, např. PC, jízdní kola, hodinky, fotoaparáty atd. Jsou po doručení do Zimbabwe rozprodávány ve většině případů na tržištích atd. a k původní námi myšlené cílové skupině ani mnohdy nedojdou.

Efektivním východiskem pro Zimbabwe je realizace rozvojové spolupráce, formou nevládní pomoci, která je vedena charitativními a neziskovými organizacemi, které působí na místě a pracují přímo s cílovou skupinou. Nevládní pomoc se snaží o stálejší a dlouhodobější dopady rozvoje. Do této skupiny řadíme projekty, kdy neziskové organizace budují školy, nemocnice nebo se finančně podílí na rozvoji konkrétního regionu či komunity. Jsou financované soukromým dárcovstvím, ale také pomocí grantů a veřejných zakázek, které vypisují státy a finanční instituce. Často tedy působí jako jejich prodloužená ruka, která zhmotňuje peníze ve své ideály.


Určité směřování rozvojové spolupráce vidíme také v nabídce a poptávce. V dnešní době velmi oblíbená, poptávkově orientovaná pomoc, nad kterou bychom se měli důsledně zamyslet před jakoukoliv realizací rozvojové pomoci a vhodně ji vyhodnotit. Když se podíváme na tzv. poptávku příjemců, jedná se nejen o finance v hotovosti, ale i o věci moderní doby.

Doporučení do praxe uvádíme i práce se studenty, kteří jsou součástí společnosti, které patří k těm nejaktivnějším a nejprogresivněji uvažujícím, navíc s velkým přesahem do jiných společenských skupin. Je třeba zmínit například i jejich spolupůsobení s nevládními organizacemi, které se zde v Zimbabwe také ukázaly být hybnou silou odporu proti katastrofálním politikám centrální vlády vedené ZANU PF.

Domníváme se, že ačkoliv je současná situace v Zimbabwe komplikovaná, převážně z politického charakteru, zemi je možné pomáhat i za současných (ne mnohdy za snadných).

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TEACHING DEMOCRACY AND ACTIVE CITIZENSHIP THROUGH CITIZENSHIP EDUCATION: HOW DO WE KNOW IT WORKS?

Paulina Pospieszna

Abstract

Citizenship education, i.e. activities aimed to teach citizens of recipient countries basic values, knowledge, and skills how to be an active and engaged citizen, has become a popular form of empowering young people within democracy assistance of young democracies from Visegrad countries. This paper outlines some of the programs aimed at educating and activating young people in Eastern Europe to be more socially responsible for their local community, region, and country, and focuses on impact evaluation of these programs. Different methods used to evaluate the impact of the citizenship education programs are being presented and discussed together with their advantages and limitations. These suggestions can be useful for both practitioners wishing to learn whether their citizenship education programs produce impact, as well as for researchers wanting to answer the question whether and how citizenship education efforts of organizations from Visegrad countries influence young people.

Keywords: citizenship education; active citizenship; youth participation; youth empowerment

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INTRODUCTION

Citizenship education becomes an important sphere outside the school educational system. We find that many of the projects implemented by the young democracies from Visegrad group take a form of citizenship education as a form of sharing their experience with democracy. The goal of these programs is to encourage young people to become aware and active citizens, and ready to take actions in their close community, region, and the country. These educational programs have a potential to be important part of youth empowerment

mechanism, however there is lack of evidence whether they make a difference. Therefore, the purpose of this paper is to provide discuss how organizations and researchers can measure the impact of citizenship education programs.

If we want to provide rigorous evidence we need to employ a rigorous methodology. We also need to boil down the evaluation to specific program and test the impact of this program on its beneficiaries. An impact evaluation can answer the question of whether a program works. This means we need to examine how the people who participated in the program performed compared to how they would have performed if they had not had a chance to participate in the program. We can never know what would have happened in the absence of the program, but we can use different evaluation techniques in attempt to make comparisons.

In this paper, I provide some suggestions on how we can go about measuring the impact of the citizenship education program. These suggestions are drawn on the practical experience with one of the NGOs I have a privilege to work with. The inspiration for the impact evolution methodology comes from the Abdul Latif Jameel Poverty Action Lab (J-PAL).

1. UNDERSTANDING CITIZENSHIP, ACTIVE CITIZENSHIP, AND CITIZENSHIP EDUCATION

Citizenship is often defined as the rights and duties relating to an individual's belonging to the political community. It implies some integration into a national community and common heritage. However the definition of citizenship was subject to many challenges and thus evolutions. Each time when the community becomes a place where it is difficult to live it—let it be war or autocratic regime—and people demand the redefinition of citizenship rights, the concept of citizenship is challenged (Barnett and Low 2004). The promotion of democracy and human rights by international organizations and associations, as well as globalization process expanded the definition of citizenship to include some universal rights. In times of globalization the definition of citizenship evolved and seems to be separated from the strong identification with the nation-state. This of course does not mean that such people living in a given country want to waive their nationality, but rather that such identity becomes secondary.

The citizenship also becomes to denote not only rights and obligations, but also how individuals behave on everyday bases, what activities they are engaged in, and how they relate themselves to the smaller (city, town, village) and broader community (e.g. global community). In other words, participation became to be perceived as an important element of citizenship. Hence “active citizenship” has been used to refer to people who feel responsible for the community, who feel potential to make a change, who are ready to take action and who get involved in local communities (Crick and Lockyer 2010). There is no active citizenship without participation, but is not restricted to political participation only. As various efforts of scholars and practitioners to measure active citizenship for democracy show, active citizenship is understood as participation in civil society, community and/or in political life (De Weerd et al.2005; Ogris and Westphal 2005; Abs and Veldhuis 2006; Hoskins 2006). Democracy in principle demands that citizens participate, thus active citizenship and democracy are closely related and one cannot exist without another.

Just like definition of citizenship has changed, also the theory and practice related to citizenship education evolved. Commonly, the term citizenship education has been associated with a subject at schools (Solhaug 2013) that aims to provide knowledge about political concepts,

political processes and institutions at various governmental levels, as well as to increase understanding of citizens' engagement in decision-making process. Remarkable efforts to rethink civic education might be seen in last ten to fifteen years. Much attention has been paid to citizenship education in terms of evaluation and improvement of school-based education aimed at developing democratic knowledge and skills (Campbell, 2007; Campbell, 2008; Lawy and Biesta, 2009; Martens, 2012; Veugelers, 2011). After reviewing the classical literature on democratic citizenship (e.g. Almond and Verba, 1963; Biesta, Lawy, and Kelly, 2009), Print (2013) presents five dimensions of active citizen: knowledge, skills, attitudes, values, and intended behaviour/dispositions, which may constitute an integrated approach to civic education. Print and Lange (2012) and Print (2013) recognize those dimensions as the basis for education and enhancing civic competences within schools through the formal but also informal school curriculum.

However, the need to improve youth' engagement in decision-making process through developing skills of critical thinking, debating, and undertaking civic and political activities by young people and encouraging them to actively participate and instil democratic values, challenged citizenship education as a subject at schools (Mycock and Tonge, 2014). According to Himmelmann (2013, p. 3), we can observe: *"a new and specified form of 'democratic citizenship education' beyond just civics; for a new way of 'teaching democracy' beyond teaching institutional political settings or a new 'education of, for and through democracy' beyond mere teacher-centered instruction in politics."*

Thus, citizenship education that includes educational efforts in order to strengthen democracy and qualify citizens for participation, has become not only the domain of schools and national educational systems, but also other actors who engage in this field. The need for educating young people for being more active citizens seem to be more and more popular approach among non-governmental organizations both domestic and international (Schulz, 2008; UNESCO, 2014). Citizenship education seems to be interrelated with empowering youth and building well-functioning and strong civil society (Maroshek-Klarman 1996). It is believed that NGOs citizenship education' projects are part of youth empowerment mechanism aimed at increasing youth participation in civic life.

However, we still have little knowledge about the direct and indirect role that citizenship education plays in activating young people (Biesta, 2011; Galston, 2001; Lawy and Biesta, 2009). Moreover, little is known whether and how citizens can be educated about the idea of responsible citizenship and participation outside educational system and whether and how important role can play non-governmental organizations in this process. Therefore in my study, I aim to fill this gap by studying citizenship education efforts of non-governmental organizations, especially from other countries. I believe that NGOs from young democracies have unique perspectives and approach to teach and promote democratic values. In this short paper, I would like to present briefly these efforts to influence young people, and since my aim is also to evaluate these efforts, I would like to discuss possible methods of evaluating citizenship education programs.

2. SHARING THE EXPERIENCE WITH DEMOCRACY THROUGH CITIZENSHIP EDUCATION PROGRAMS

Believing that active citizenship starts with education, many youth projects initiated and organized by the NGOs from Visegrad countries in other countries in the region, take a form

of citizenship education programs. The NGOs experiences undoubtedly also shaped their view on how other countries should be assisted in their struggle to democracy. They played an important role during the democratic transition and where recipients of aid themselves, which helped them develop a unique form of passing their experience and a good example to other countries (Pospieszna 2014). Citizenship education undoubtedly is one of the ways to share the experience with democratic transition.

What does citizenship education mean for the NGO? For them it is a fieldwork, where they are trying to put the young people in the environment that is very different from that at school and at home, *i.e.* take part in activities aimed to teach them basic values, knowledge, and skills relating to democracy. Citizenship education is practiced through activities organized in the partner countries, such as providing didactic materials to schools, organizing workshops, discussions and knowledge contests. The bulk of citizenship education programs, however, is implemented outside the partner country and takes the form of: summer schools, internships, scholarships, exchange programs, and study missions programs.

Within my research project, I work with the NGOs that every year invites over 200 students from Belarus, Moldova, Ukraine and the Russian Federation to come for a two-week visit. The aim of the program is provide an incentive for the students to actively participate in public life and become aware citizens. The program is based on informal education methods—the organization creates environment in which the youngsters can experience democratic values. Students can meet with governmental officials, local authorities; they visit various public institutions, media outlets, and companies. The participants also meet with students at the universities and with representatives of student associations, as well as with representatives of non-governmental organizations. They have a chance to ask question, but more important to take parts in debates during which they can experience different opinions and attitudes.

Young people have a great potential to play important role in a society and that in order to boost their participation youth empowerment mechanism is required, which might not be created from within the country, just like in an authoritarian state like Belarus. Therefore participation in such educational program may build young people' sense of power that they are able to make changes in their communities they belong to, region and even their country. However, the questions I am trying to answer in my research are: How can measure impact of this intervention, and how can we be sure that the changes we observe in the participants can be attributed to the program?

3. MEASURING THE IMPACT OF THE CITIZENSHIP EDUCATION PROGRAMS ON YOUNG PEOPLE

We have a clearly defined program, with a clear goal, and we want to know if this specific program as a whole works. How can we go about finding this out? Below I discuss the advantage and limitations of some of the most common impact evaluation methods that can be employed.

Before-and-after comparisons

This method measures how program participants improved or changed as the result of their participation in the program. The outcomes of the participants are recorded before the program is implemented and these are then compared to the outcomes of these same participants

after the program ends. We have to collect data on the outcomes of program participants before and after the program is implemented. This can be done through surveys conducted before and after the program. For example, the organization I am working with runs survey among the participants before the program in order to measure their knowledge, opinions, attitudes regarding the role of the citizens in the society, the role of government, the attitudes toward the European Union and the like, and then the same set of questions is being asked in the post survey.

This methodology allows comparing the outcomes before and after, and if the scores are higher than they were before the program started, it seems that the program has made a difference. Is the before-and-after comparison the right methodology for evaluating the program then? The methodology seems to be simple, but questionable whether we can be sure whether the change in scores can be attributed to program intervention, or whether something else caused scores to rise. If we simply measure knowledge and perceptions before and after the programs, we cannot be certain whether some or all of the improvement was due to the many other things that changed and influenced the learning of the young people during the same time.

The greatest limitation of the methodology is that we assume that the program was the only factor influencing any changes in the measured outcome over time, however, many other factors other than the program we are evaluating can change the outcomes of the program over time, especially if the program lasts longer. Especially, if the beneficiaries of the program are young people who, in contrast to adults, develop and change quickly. They can be activated or informed by doing something with their peers, or taking part in other parallel events, or being influenced by parents, teachers. All other factors probably could educate and empower young people even if these young people were not given a chance to participate in the program.

In order to overcome the drawbacks of this methodology we can conduct surveys immediately after the end of the program. Also, this methodology is recommended to evaluate the programs that had short time span—then we can limit the influence of many other factors than a program, which could influence changes. If there is one year or more between pre and post tests than we risk that many factors will have influenced the learning levels of the young people who participated in the program. However, even in short-term programs, we may either underestimate the impact of the program, we might even find no impact; and also we may also overestimate impact by assuming that all the improvements were due to our program.

Participant—nonparticipant comparison

According to this methodology instead of comparing scores before and after participation in the program, we could also compare the scores of those young people who got to the program to those who did not participate in the program. Again we conduct surveys and if we find that there is a difference between for example knowledge, attitudes and interests of participants and non-participants we can attribute this difference to the program.

Although this methodology allows us with the higher confidence to see the difference between what happened with the program with what would have happened without the program, this also methodology has some limitations. Usually those who were recruited to the program are often already different from those who do not. For example, an NGO I am working with in the recruitment procedure already requires from students to be active and

participate in different organizations. The program selects participants based on qualifications and it is quite possible that the young people are already well-motivated and activated and care more about democratic values than those who did not apply. In other words, those who get receive a program are already different from those who did not get a program. This tendency is called a selection. If we fail to account for selection in our impact evaluation, we can introduce selection bias into our estimate of impact. This means that we may risk attributing differences in outcomes to the program when they are actually caused by differences already existed between those selected and non-selected to the program.

An impact evaluation is only as good as the comparison group that can mimic what would have happened in the absence of the program. If the comparison group is not good enough it can ruin the evaluation and make it invalid. Therefore, the way to overcome the problem of preexisting differences in this methodology would be to employ randomized controlled trials discussed below.

Running randomized evaluations

The key feature of a randomized evaluation is that the people who have access to the program are selected randomly. This methodology ensures that there are not systematic differences between participants and non-participants (comparison group), and allows to measure what impacts were caused by the program (Glennester and Takavarasha 2013). The NGO I am working with has already employed this methodology to evaluate its citizenship education program directed toward young people from the Eastern Europe. Randomized evaluations should be designed before the project starts, therefore there were many program-specific issues that we had to discuss in order to match the expectations of the organization, donor, and requirements of this methodology. Hopefully, soon I will be able to present the results of the impact evaluation of the program.

Qualitative methods

The above-presented methods of measuring the impact of citizenship education programs are some quantitative impact evaluations. Of course, there are qualitative methods that are being used by the organizations, such as open-ended interviews with the participants, to investigate the impact of the program. The major difference between qualitative and quantitative methods is that the latter do not attempt to reduce experiences to data. The advantage of this method is that may touch upon the issues that might be discussed in closed-ended survey questions. In other words, we may collect some rich, detailed information, that otherwise would not be collected. The difficulty in applying this method is in the interpretation and analysis of the information collected. Despite the limitations, I found that many organizations implementing citizenship education projects present the stories of the former participants who became important civil activists or even politician in order to demonstrate the impact of their projects. The participants may discuss how the program has impacted them, changed their perceptions, knowledge or even lives, but it requires from the participant to know what would have happened in the absence of the program.

When asking participants how a program changed their lives we asking them to disentangle all the many chances that were going on in society from those that were driven by the participation in the program. This however, still might be difficult. Therefore, this method is good for simply describing a situation, but does not allow drawing conclusions about the impact of the program.

CONCLUSION

Measuring the impact of intervention requires from us to compare what has happened with the intervention with what would have happened without this intervention. If we are interested in evaluating impact of citizenship education we should test the impact at the micro level. I suggest evaluating the citizenship education programs implemented by the organizations inside or outside the country. Many NGOs in Visegrad countries engage in promoting active citizenship among young people through the programs that aim to educate, and to raise awareness and thus to empower young people to be active citizens and advocats of pro-democratic changes.

In this short paper I presented some possible impact evaluation methods based on the experience with partner organization in evaluating the citizenship education program. These are some practical suggestions for the organizations wishing to find out the impact of their programs. However, the impact evaluation methods may allow also researchers to understand better how citizenship education is being practiced through other venues than schools and what the role of NGOs can play in this process.

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NON

ACADEMIC

PAPERS



SLOVAK CONTRIBUTION TO EASTERN DIMENSION

Izabela Nagyova

Abstract:

This information paper provides a brief overview of the recent Eastern Partnership's results and impacts achieved both at the EU and Slovak level. Slovakia has identified the Eastern Partnership as one of its foreign policy priorities and directs a third of its development assistance to the Eastern Partnership partner countries. The article concludes with Slovakia's continued interest in helping Eastern partners to advance the process of reform, transformation and transposition of European values, democracy and human rights.

Keywords: Slovakia, Eastern Partnership, Slovak Aid, Georgia, Moldova, Ukraine

INTRODUCTION

Who do I call if I want to call Europe? Perhaps surprisingly, the answer to question that has been attributed for decades to Henry Kissinger; the former U.S. Secretary of State will be Slovakia. The country is currently in the middle of intense full preparations for its turn in hosting the Presidency of the Council of the European Union in the second half of 2016.

Along with countries preceding and following it, the Netherlands and Malta, it wants to focus on the digital single market, energy security and aims to have the thriest presidency of the Visegrad Group countries [1].

For Slovak Presidency, at the same time, the main points of external relations will particularly include the EU relations with the countries of the Eastern Partnership (EaP) and Western Balkan states.

As a country located on the eastern border of the European Union, it is surely one of the top Slovak program priorities to discuss the adequate systematic steps and strategies towards the developing situation in Ukraine and to support the integration ambitions of Moldova, Georgia and the Western Balkan countries.

1. A POLICY THAT DELIVERS

The EaP launched in 2009, a joint undertaking of the EU and its Eastern European partners Armenia, Azerbaijan, Belarus, Georgia, the Republic of Moldova and Ukraine, has recently advanced in concrete terms across a range of bilateral and multilateral cooperation areas since the 2013 and 2015 summits in Vilnius and Riga.

The signing, provisional application and first steps in implementation of the most ambitious ever bilateral Association Agreements including a Deep and Comprehensive Free Trade Area (AA/DCFTAs) with Georgia, the Republic of Moldova and Ukraine have brought the EU's relations with these countries to new levels.

The focus is now on the implementation of these agreements, through reforms, to unlock a broad range of concrete benefits. A majority of the EU Member States have already ratified the AA/DCFTAs.

1.1 Differentiation and inclusivity

Provisional application of DCFTAs has shown an increase in trade, which is an important engine for growth:

- The overall trade figures for 2014 are very positive for imports from Moldova, which increased by 20% on the year-on-year basis, while Moldova's total trade volume increased by 8% on a year-on-year basis.
- Georgian exports to the EU rose by 12% in the first six months of the DCFTA. EU exports to Georgia have remained stable and there has been no sudden increase.
- Trade with Moldova is increasing significantly, thanks to Moldovan exports. A sharp rise in trade began already in 2014, prior to the signature of the AA. EU imports from Moldova rose by 20% overall and imports of agricultural products by over 30%.
- Trade facilitation actions continued with the signature of the Strategic Framework for EU-Georgia Customs Cooperation in March 2015 and the ratification under way in Moldova of the Pan-Euro-Mediterranean regional convention on rules of origin. This will make trade in goods easier and will simplify customs procedures.
- To support the implementation of DCFTAs a special DCFTA Facility for Small and Medium-sized Enterprises (SMEs) was created to unlock new investments in Georgia, Moldova and Ukraine.

Against the background of the conflict in eastern Ukraine and its difficult economic situation, the EU has stepped-up its engagement with Ukraine providing consistent political, financial and economic support in a short space of time.

- In March 2014 the EU adopted a comprehensive financial package of EUR 11 billion to help the reform process in Ukraine. Since then, the EU and European Financial Institutions have delivered EUR 6 billion, including the additional Macro-Financial Assistance package of 1.8 billion in 2015.
- In April 2014 the EU granted Autonomous Trade Measures to Ukraine.
- The EU has also provided substantial humanitarian assistance to Ukraine amounting, together with its Member States, to EUR 100 million.
- As part of its comprehensive engagement with Ukraine, the EU also brokered a winter energy deal between Russia and Ukraine and is actively supporting a new, lasting deal in view of the next winter. Energy sector reform will continue with enhancing the energy efficiency and restructuring of Naftogas.
- The EU has deployed an Advisory Mission to assist Ukraine in its efforts of reforming the civilian security sector. The European Commission also created a group of experts to support the reform process in Ukraine – the Support Group for Ukraine [2].

1.2 Mobility and people-to-people contacts

Enhanced mobility of citizens in a secure and well-managed environment remains a core objective of the EaP.

- A successful visa free regime introduced with Moldova since April 2014 is an example of progress achieved on the agenda of visa liberalisation and enhancing mobility with our Eastern Partners and facilitating travel, business, education and training, and people-to-people contacts. Over the past year, nearly half a million Moldovans have travelled visa free to the EU.
- A substantial progress has been achieved by Georgia and Ukraine in implementing their Visa Liberalisation Action Plans.
- Negotiations with Belarus on Visa Facilitation and Readmission Agreements are near completion and signing of the Mobility Partnership Declaration is foreseen in next couple of months.

Partner countries' association with a number of EU Agencies and programmes, such as Horizon 2020, Creative Europe and COSME, has broadened considerably over the last one-and-a-half-year.

The Erasmus+ programme has been opened to the EaP partners.

- Erasmus+ (exchanges in the higher education): a call for proposals was opened to all EaP countries. Under the Erasmus+, it is expected to fund more than 15,900 mobilities of EaP nationals from 2014 to 2020.
- Creative Europe (promoting media and artistic creation): Georgia participates since February 2015; Moldova and Ukraine are joining in the course of this year.
- COSME (for SMEs networking): Moldova is participating since February 2015; Ukraine and Armenia are exploring their participation.
- Horizon 2020 (allowing for joint research programmes): Moldova is associated since January 2014; Ukraine since January 2015; there is also a progress towards associating Georgia and Armenia.

1.3 Interconnections

Energy interconnections in the EaP region have been enhanced since the last two years.

- Natural gas reverse flow capacities to Ukraine from Hungary, Poland and Slovakia have been enabled.
- Work has advanced considerably on the Southern Gas Corridor, on the expansion of the South Caucasus Pipeline, the Trans-Anatolian Pipeline and the Trans-Adriatic Pipeline.
- Iasi-Ungheeni gas interconnector has been inaugurated in 2014 and preliminary work started on electricity interconnector Issacea-Vulcanesti.
- A Cooperation Arrangement between the European Commission and Belarus on an Early Warning Mechanism in the area of energy has been finalised.

The EU has made a substantial financial commitment to the EaP in support of the agreed reforms in the partner countries.

- Since the launch of the EaP, the EU has made EUR 3.2 billion available to partner countries. In 2014 alone, EUR 730 million have been provided by the European Neighbourhood Instrument.

- Moldova is one of the highest recipients of EU aid per capita worldwide, with new bilateral commitments in 2014 of EUR 131 million and bilateral assistance in 2014-2017 of up to EUR 410 million.
- For Georgia, the EU has substantially increased its bilateral assistance from EUR 180 million in 2011-13 to up to EUR 410 million in the period 2014-17. In addition, Macro-Financial Assistance of EUR 46 million was mobilised for Georgia with first EUR 23 million already paid.
- SMEs in Georgia, Moldova and Ukraine will also benefit from the newly created DCFTA Facility for SMEs, where EUR 200 million grant from the EU budget will combine with loans from the European Financing Institutions (notably, EBRD and EIB) in order to unlock up to EUR 2 billion of new investments in the three countries.

2. LINKING THE EU WITH ITS EASTERN NEIGHBOURS

Slovakia belonged, even in the period prior to its entry into the EU, to the states supporting the idea of institutionalizing a separate Eastern dimension of the Union. From 2003 the country officially supported democratization processes in the states of the former USSR, with a preferential orientation on Ukraine and Belarus.

The value and ethical dimension of the EaP program as seen by Slovakia was also emphasized by the present Minister of Foreign and European Affairs Miroslav Lajčák, who defined the program as “a chance to return the assistance received at the very start of our transformation process through our assistance and transfer of experience”.

In doing so, he pointed out that the program provided the states of the EaP with assistance in the introduction of ‘a proven model of the functioning of society’ and a ‘culture of cooperation typical of the Union’ [3].

2.1 Active contribution to EaP through Slovak Aid

The EaP remains present within Slovakia’s foreign policy in the long term. This is also what follows from the Medium – Foreign Policy Strategy of the Slovak Republic until 2018, under which the group of project countries receiving Slovak official development assistance still includes states that the Slovak Republic considers its priorities within the framework of the EaP, i.e. Belarus, Georgia, Moldova and Ukraine.

In 2014, discussions were held with Belarus between the Ministers of Foreign Affairs as were meetings between the State Secretary and his Belarusian counterpart.

Of the southern Caucasus countries, Slovakia has traditionally had closest bilateral relations with Georgia [4]. Spring 2014 saw the opening of a Slovak diplomatic mission in Tbilisi. Slovakia numbers among those who actively support Georgian ambitions to be integrated into the European and Euro-Atlantic political, economic and security structures.

Slovakia is also one of the most active supporters of Moldova’s EU integration ambitions [4]. It is backing the reform processes in the country in several areas.

The importance Slovakia attaches to Moldova is underlined by the fact that it is one of the three programme countries for Slovak development aid, and there is an agreement between the two countries on development cooperation.

In the same time, Slovakia would continue to develop ambitious neighbourly and friendly relations with Ukraine, while promoting democracy, reform and stabilisation processes tending toward political association and economic integration with the EU [5].

Transferring experience of the transformation process to these countries is also one of the main pillars of Slovak Aid [6]. These projects make use of the Slovak comparative advantage, i.e., experience from institution building, democratization of society, reforms, and creating a market economy as well as integration into the EU and NATO.

Cooperation, which is mainly in the form of technical/expert assistance, has exceeded the total of 8 million EUR since the EaP's inception in 2009.

To name just a few examples: the National Convention on the EU in Ukraine and Moldova, reform of public finance or water supply, sanitation and solid waste management in Moldova, building civil society and cooperation between governmental and non-governmental sector in Belarus and Ukraine, surface water quality monitoring and assessment in Georgia, etc.

SlovakAid activities in the programme and project countries of Slovak development cooperation included:

- funding from Slovak diplomatic missions in Minsk, Tbilisi, Chisinau and Kiev for small development projects (118 micro-grants of up to EUR 5,000 with a contractual value of EUR 558,370),
- sending volunteers to developing countries – 26 applications were approved to send volunteers to Belarus, Georgia, Moldova and Ukraine in total of EUR 681,000,
- providing technical assistance through CETIR (Centre for experience transfer from integration and reforms) for state-building and state institution building, the democratisation of society, the implementation of reforms and the creation of a market environment as well as the process of integration into Euro-Atlantic structures (34 activities were approved for all 4 countries to a total of EUR 101,600).

Slovakia will also continue to develop pragmatic relations with the other EaP countries – Armenia, Azerbaijan and Belarus – and to encourage them towards activities that would lead to improved relations with the EU. Slovakia's priority is the development of political dialogue and the activation of bilateral political and economic relations.

Enhancing EU cooperation with the countries of the EaP remains at the heart of Slovak foreign policy. An essential part of its further development will be the adaptation of the EaP policy to the current political reality in Europe.

ENDNOTES

- [1.] See the “Who do I call if I want to call Europe? Slovakia's Presidency of the Council of the European Union,” May 24, 2015. Online: <http://www.phoenix-acumen.com/blog/slovakia-presidency-of-the-council-of-the-european-union/>
- [2.] The EU and Armenia have reached an understanding on the scope of their future contractual relations that take into account the other international commitments of Armenia, in particular its decision to join the Eurasian Economic Union (EEU). This year in May, the European Commission adopted a proposal to the Council for a new mandate, paving the way for negotiation of a new agreement between the European Union and Armenia soon.
- [3.] Minister's speech delivered at the Matej Bel University in Banská Bystrica on November 4, 2009.

- [4.] Slovakia opened its diplomatic mission to Chisinau in July 2013.
- [5.] Despite Armenia's decision to join the Eurasian Economic Union, Slovakia remains committed to greater communication with a view to outlining opportunities for further cooperation. Azerbaijan is an important partner in the region, especially in terms of energy security.
- [6.] The term 'Slovak Aid' signifies all activities falling under the Slovak official development assistance system. The Slovak Agency for International Development Cooperation (SAIDC) established in 2007, is responsible for managing bilateral and trilateral development projects. Its responsibilities include contracting, implementation, monitoring and evaluation of bilateral and trilateral development projects.

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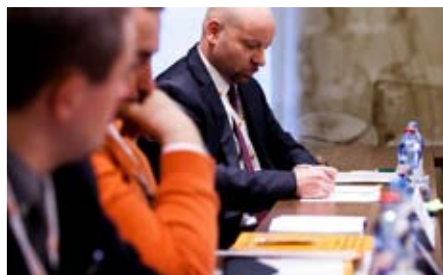






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