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Commodification, the Welfare State and Israeli Kibbutz

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The notion of commodification refers to the degree to which the individual is dependent upon the market for the satisfaction of his economic and social needs. The welfare state has been described as having a decommodifying influence in that it provides the individual with the means to maintain a reasonable standard of living while not working. An examination of the Israeli Kibbutz is undertaken in order to understand the workings of an extreme case of decommodification. In Kibbutzim, there exists a very highly developed system of welfare services that are determined by individual needs and not by individual earning power. While the nature of these communities clearly prevent direct comparisons with the welfare state, the very fact that such highly decommodified societies have existed for over seven decades should shed light on the debate over the degree to which states can intervene with the play of market forces.

Introduction

The interrelation between the market and the welfare state in capitalist societies has been a theme that has dominated much of the literature dealing with the the welfare state. At its height, the welfare state was regarded as a mechanism through which the play of market forces is modified so as to guarantee individuals and families a minimum income, to narrow the extent of insecurity by enabling them to meet certain social contingencies and to offer a high standard of social services to all, regardless of status or class (Briggs, 1961). One of the major implications of the welfare state crisis and the growth in support for anti-collectivist ideologies in virtually all the welfare states, however, has been a growing tendency to re-introduce the market into fields which, until the mid-seventies, were generally

regarded as beyond its domain. The enthusiasm with which governments of different political shades have sought to privatize various aspects of the welfare system is but one facet of this tendency (Doron, 1991).

In an attempt to understand the dynamics of the changing relationship between the market and welfare state, researchers (Rein, Esping-Andersen and Rainwater, 1987) employ the notion of commodification as a means with which to describe the varying degree to which an individual is dependent either upon the market or the mechanisms and institutions of the welfare state in order to satisfy human needs. This essay will examine an extreme case (Feagin, Orum and Sjoberg, 1991) of decommmodification - the Israeli communal society called the kibbutz. This society (or, rather, this group of communal settlements), which has existed since nearly the turn of the century and today has a population of nearly 130,000, is a unique, yet not irrelevant, example of a society in which the satisfaction of the needs of the individual is divorced almost entirely from his or her market value. Indeed, it has been recently described as the "most complete model of the integrated socialist welfare principle" (Bar Yosef, 1985). Here, it will be proposed that the kibbutz is an example of a nearly totally decommmodified society.

The use of the term "commodity" in order to describe the function of labour refers to the manner by which human beings in capitalist society are defined solely in the terms of their labour power. Depicting the free market economy as a stark and antagonistic dichotomy between workers and capitalists, Marx (1975) notes that the workers are totally dependent upon their ability to compete in the market and obtain wages in order to support themselves and their families. This puts them at the mercy of the laws of supply and demand and at a disadvantage vis a vis the employer, who has additional sources of income. Indeed, workers are worse off than other commodities due to the fact that the value of their labour depends upon its being constantly exchanged. It cannot be accumulated nor can it be saved. They have, therefore, no choice but to seek to constantly sell their labour power at whatever price the market sets for it.

A century later, Karl Polanyi (1957) modified this idea in his study of the evolution of the market economy in capitalist

society. The rhetoric of free market aside, he notes, social protection in capitalist countries has undermined the idea of a market in which human labour is solely a commodity. While accepting that a characteristic of capitalist society is the tendency to make one's life chances wholly dependent on his or her disposable income, Room (1979) also emphasizes that "a progressive divorce of wage and disposable income" has taken place in welfare states due to the introduction of private, and, later on, state social security systems, the progressive income tax system and the development of state agencies which provide services for citizens at less than their market value (p. 14).

This theme is taken up, and dealt with extensively, in the writings of Claus Offe (1984) who identifies the relationship between the market and non-market governmental intervention as an inherent contradiction of the welfare state. "A supportive framework of non-commodified institutions, he notes "is necessary for an economic system that utilizes labour power as if it were a commodity" (p. 263). Offe, and Habermas before him, employ the notion of decommodification in order to describe a wide range of compensatory and market-replacing activities undertaken by the state (Keane, 1984, p. 84). As such, any non-market based state policy, be it the existence of social security transfer payments, government expenditure on infrastructure or the functioning of public health institutions, is grouped under the notion of decommodification.

Gosta Esping Andersen and his associates provide the most significant attempt to provide a formal and operational basis for the notion of decommodification. They define decommodification as "the degree to which an individual commands the means to satisfy his or her social and familial needs independently of the cash nexus" (Esping Andersen and Kolberg, 1991, p. 78). Esping Andersen (1990) describes decommodifying welfare states as those in which "the citizens can freely, and without potential loss of jobs, income, or general welfare, opt out of work under conditions when they, themselves, consider it necessary for reasons of health, age, or even educational self improvement" (p. 23).

The notion of decommodification assumes, then, that the lesser the individual's dependence upon the market for the

gratification of individual or family needs, the easier it will be for him/her to opt out of the market. This act of freely removing oneself from the market will be possible for most individuals (except for the very rich) only because the welfare state will ensure the continued gratification of their needs despite the fact that they are not earning a living as part of the market.

Taken to its logical conclusion, this equation should enable us to create two theoretical poles on a commodification continuum upon which existing welfare states (or a single welfare state in different stages of its development) can be placed. The two ends of the continuum can be defined as a Totally Commodified Society (TCS) and a Totally Decommodified Society (TDS). The idea of a society closest to the notion of a Totally Commodified Society (TCS) would be that proposed by classical liberalism, in which there is no state intervention in the workings of the market and the individual is totally dependent upon the market value of his or her labour in order to survive. The logic of this society is obviously based on the capitalist notion that the risks and the chances of the free market are the incentives without which economic growth is impossible. Wealth will be created only when unfettered individuals compete freely in the market. Social policies, which interfere with the workings of the market by providing incentives not to work (in the form of unemployment benefits, for example), will serve as obstacles to a successful economy. While a Totally Commodified Society would seek ways to deal with the "truly needy", it would presumably take the form of a residual welfare system that does not threaten the market as often proposed in the works of contemporary New Right writers (Murray, 1984; Freeman, 1981).

The notion of a Totally Decommodified Society (TDS) would be one in which there is no connection whatsoever between the market value of an individual's labor and his or her standard of living. Society, through its welfare and social security mechanisms, would ensure that, regardless of whether the individual is a participant in the market or not, he or she would enjoy a constant standard of living. The individual in such a society would work, yet the nature of his or her work would not be in

any way linked to the satisfaction of needs and desires. On the basis of the Esping-Andersen notion, an individual in such a society would be able to freely opt out of the market safe in the knowledge that this would in no way endanger the gratification of his or her needs. Presumably, in the TDS social security programs would be devoid of the time limits, conditions of eligibility, or limitations on the levels and span of benefits, that characterize existing social security programs and that seek to limit moral hazard and discourage "scroungers" (Deacon, 1976). Obviously, the very existence of such a society, in which there is no link between effort and reward, runs counter to the accepted wisdom of not only free-marketeters but also of the more centrist economists and social policy thinkers. The need to strike a balance between social security income guarantees and privately secured incomes has long served as an iron law for those seeking to achieve economic efficiency (Okun, 1975) and maintain a willingness to work while, at the same time, ensuring the existence of income guarantees that provide a safety net for the poor, disabled, and unemployed (Burns, 1956). A TDS would appear inherently inefficient and unmanageable to such views and inevitably doomed to anarchy and bankruptcy. The Israeli kibbutz would, however, appear to undermine this accepted wisdom (Maron, 1993).

The Kibbutz

The kibbutz is a term used to describe 270 communal settlements in Israel. The first kibbutz, named Degania, was established in 1911 as a rural community (Baratz, 1945). The founders of the first kibbutzim (plural of kibbutz) were young Jewish immigrants from Eastern and Central Europe who sought to participate in the Zionist effort to establish a Jewish homeland in Palestine. Many of these young immigrants brought with them the collectivist notions that were an integral part of the radical ideologies of the revolutionary movements then active in the Eastern Europe. They sought to establish an egalitarian Jewish society in Palestine. The leaders of the Zionist movement supported the establishment of collective rural settlements by these young immigrants as a means of settling Palestine (Near, 1992).

Since the first kibbutz was established, the kibbutz movement has grown significantly. In 1991, 129,300 people lived in 270 kibbutzim, affiliated to three different kibbutz movements, scattered throughout Israel (Maron, 1992). Nevertheless, they have retained a number of key characteristics. They remain relatively small, intimate communities. The size of the average kibbutz is 463 inhabitants (Maron, 1991, p. 12). Membership is voluntary and dependent upon identification of members with the basic values of kibbutz society. The decision-making process is still based upon a large degree of participatory democracy. These characteristics have ensured a high level of internal cohesion on the kibbutzim.

The kibbutzim make up 2.6% of the population of the country. The population of the kibbutzim is similar in its demographic characteristics to that of the general population of Israel. 10.2% are elderly, over the age of 65 (slightly higher than the national average), while just below 30% are under the age of 14 (slightly below the national average).

While at their outset, the kibbutzim were agricultural settlements, today the emphasis is upon industrial production and services. Nevertheless, most kibbutzim usually combine both agricultural and industrial or service production. In both fields, the role of the kibbutzim is far higher than their proportion in the population. Thus, despite the drop in agricultural production, kibbutzim still produce a third of the entire agricultural product in Israel (Meron 1991, p. 38). Industry comprises two thirds of the total kibbutz production today and is growing. The kibbutz industries comprise 8% of sales and 9% of all industrial exports in Israel (Kibbutz Industries Association, 1992).

The kibbutz movement has served as the object of extensive study in a large variety of fields, in particular that of education (Shepher, 1974; Shur, 1976). The issue of welfare and social security on the kibbutz and its implications for the welfare state have, however, not been the subject of such scrutiny. In order to understand better the manner with which the kibbutz deals with these issues, it is necessary to clarify first issues of equality and distribution on the kibbutz.

Equality and Distribution on the Kibbutz

The notion of equality has long been associated with the kibbutz and, indeed, has been the subject of much academic scrutiny and polemics. Tumin (1967), for example, described the kibbutz as an example of a society that has achieved near total equality. Other writers, particularly Ben Rafael (1988), have indicated that social stratification does, in fact, exist on the kibbutz. However, this stratification focuses upon status rather than material differences between individuals on the kibbutz.

The initial attempts to institute equality in the daily life of kibbutz members were a result of the socialist values of the founders. The adoption of equality, however, was also a pragmatic response to the demands of a national movement which sought to establish agricultural communities for young East European immigrants in the sometimes hostile, and certainly harsh, conditions of Palestine in the second and third decades of the century. Over time, and in response to the need to institutionalize the egalitarian nature of kibbutz life, the notion of kibbutz equality became formalized in a series of documents which set forth both the goals of the kibbutz and the kibbutz movement, and also the rights and obligations of the members and the community. In 1951, the Ihud kibbutz movement, the largest and least radical of the movements, published a founding platform which stated that the essence of the kibbutz was:

“ . . . the building of a socialist form of economy and life in workers' settlements that are based upon self-labour, equality of human value, full communality in the ownership of property, work, production and consumption, communal education, full joint responsibility based on the principle of “from each according to his ability, to each according to his needs” (Gadon, 1958, p.371).

The final part of the above statement, the adoption of the principle that each member contribute to the community according to his ability yet receive from the community according to his needs, provides the basis for the notion of kibbutz equality. Not coincidentally, this phrase also reappears in the Kibbutz Code that was drawn up by all the kibbutz movements in the 1960's (Article no. 66, p.13) and has been ratified on a number of

occasions ever since. On the basis of this passage, Shur (1983/4, p.190) has defined the notion of kibbutz equality as "the severing of the link between the contribution of the individual to production and society, and the return that he (or she) receives in order to fulfill his (or her) needs".

This attempt to establish an egalitarian society in which all the needs of its members are provided by the community with no link whatsoever to the earning capacity of the individual obviously requires the establishment of a very unique distribution system. In fact, the modes of distribution that have evolved over time on the kibbutzim differ between kibbutzim and according to the goods distributed. In general, however, variations of four distinct modes can be found on all kibbutzim (Gluck, 1980; Barkai, 1978). Certain goods, usually low value domestic consumer goods, are distributed freely to all members upon demand. Other items, particularly clothing and shoes, are rationed out or, more commonly, members receive allowances aimed primarily at enabling them to purchase goods of this nature. A third mode is usually adopted with regard housing and certain durable goods. These are distributed on the basis of a "point priority scale" based upon considerations such as seniority, family size and health condition.

The fourth mode of distribution, and that most relevant to the study of welfare states, is commonly implemented with regard food (which is provided in a communal dining room) and welfare (health, education and personal social services). These are distributed according to need. Thus, budgetary constraints notwithstanding, the kibbutz provides for all the individual needs of members in these fields.

The Welfare Functions of Kibbutzim

The kibbutz can be seen as a kind of "communal welfare state" with regard the welfare functions that it provides its members. In seeking to deal with the needs of its members, it has undertaken three distinct, though overlapping, welfare state roles. The kibbutz serves as an intermediary between the state and outside agencies and its members, it enhances existing state provided social services, and it provides directly services to its members.

1. *The Kibbutz as an Intermediatory:* In a number of different fields of welfare state activity, the kibbutz serves as an intermediary between the state, its institutions and other providers of welfare services, and the members of the kibbutz. While the state provides other citizens benefits and in-kind services directly, in the case of kibbutz members the process is different. In principle, the kibbutz is the recipient of benefits and funding on behalf of its members. Members do not receive benefits and services directly. Rather, the distribution of benefits and services received for individual members of the kibbutz is left to the discretion of the kibbutz.

The relations between kibbutz members, the kibbutz and the National Insurance Institute (NII) well illustrate this function. The kibbutz member is formally classified as an employee of the kibbutz by the NII, the primary supplier of social security in Israel. In a process similar to that of other employers, contributions on behalf of kibbutz members are transferred from the kibbutz to the NII. Unlike other citizens, however, the benefits are also paid to the kibbutz and not to the individual members (Ronen, 1978). Thus, old age benefits, child allowances and other benefits are all paid directly to the kibbutz in the name of individual members. Often, kibbutz members will be unaware of the level of benefits received by the kibbutz on their behalf, or even of the fact that they are eligible for such benefits.

In the field of education, the kibbutzim have their own educational institutions (often run jointly by a number of kibbutzim) that receive funding directly, as any other local authority, from the Ministry of Education. Health needs of kibbutz members are dealt with by health workers (either kibbutz members or salaried workers employed by the kibbutz) in a medical clinic on the kibbutz under the auspices of the sick fund affiliated with the Histadrut trade union federation. Thus, the educational and health needs of kibbutz members are provided in the framework of the kibbutz thereby considerably limiting the need for contact between members and additional health or education suppliers.

The intermediatory role of the kibbutz in welfare not only provides the kibbutzim with a large degree of discretion (in the health and educational fields) with regard the quality and

nature of the services and the mode of distribution of resources to members but also provides very significant financial benefits. Thus, in the case of payments to the sick fund, the kibbutzim as a sector, enjoy a discount of 16% in dues to the sick fund (Tomer, 1993). With regard state social security, the same is true. As noted above, by law members of kibbutzim are regarded as the employees of the kibbutz. Because they do not receive wages, payments to the NII (which are compulsory and based on a percentage of the wage in the case of employees) by the kibbutz on behalf of its members/" employees" are based on the upkeep of a single individual on each specific kibbutz. This figure is generally much lower than the wages that serve as a basis for NII payments on behalf of most other employees. The implications of this system are that the kibbutzim pay a particularly low rate of payments to the NII. While the benefits that the kibbutz will receive on behalf of the individual member eligible for benefits that are based on prior wages (such as maternity leave or work injury benefits) will be lower than those that it would have perhaps received if the members were working in a similar position in the free market, it should be noted that most social security benefits in Israel are universal and based upon the average wage and not linked to prior income. Therefore it appears clear that the financial advantages of this arrangement for the kibbutz as a whole clearly outweigh its disadvantages.

The reasons why the state and other institutions have granted the kibbutz this intermediatory role and provided it with a preferential financial status, can be found in both the political and financial spheres. In the past (and to a much lesser degree in the present) the kibbutz movement enjoyed political power far in excess to its size and proportion in the population. This was due to the major role played by the kibbutz movement in the establishment of the state and its position in the dominant labour movement (Horowitz and Lissak, 1989). As a result, members of kibbutzim were very significantly represented in the political elite in the first decade following statehood (Gurevitch & Weingrod, 1978). This is particularly true of the Labour movement and the Histadrut trade union federation. The kibbutzim were able to ensure that state laws (Weisman,

1966) recognized their unique collective form (thereby ensuring the kibbutz an intermediary role in welfare and other fields) and granted them a favourable financial position. The same was true with regard institutions, such as the Kupat Holim sick fund, which were affiliated with the Histadrut.

A second factor has less to do with politics and more with economics. The economic clout wielded by the kibbutz movement (even after the severe economic crisis it underwent during the late 1980s) is considerable. As representatives of a relatively large, close knit and prosperous federation of producers and consumers, the kibbutz movements have been able to negotiate preferred treatment by economic institutions. A recent example of this in the welfare field is the trend by competing pension funds to offer kibbutzim conditions for joining the funds which are better and more flexible than those offered other individuals (Gilboa, 1992).

2. The Kibbutz as an Enhancer of Welfare Services: In addition to its role as an intermediary between outside welfare providers and kibbutz members, the kibbutz as a "communal welfare state" tends to play an enhancing role. In various fields of welfare state activity, the kibbutz utilizes its own resources in order to augment existing services and provides its members with far more generous services than those provided by the welfare state to other citizens. Comparative studies of welfare expenditure between kibbutz families and urban Israeli families belonging to the sixth, seventh and eighth income deciles clearly show that in key fields of welfare state activity, per family expenditure on the kibbutzim is significantly higher. This enhancing role is especially marked in the health and education fields. Thus, for example, the monthly expenditure per kibbutz family on health reaches 159 IS (Israeli Shekels) while the average expenditure of families in the sixth decile was 92 IS, 111 IS in the seventh decile and 110 in the eighth decile. The gap in expenditure on education is even greater. The expenditure per family on education on a kibbutz is nearly treble that of an urban family in the eighth income decile (Shmueli, 1989 p. 22). The addition in expenditure in the fields of health and education generally takes the form of lower teacher-student and nurse-population ratios on the kibbutzim and a greater readiness to spend more

for the provision of additional educational and medical services for members.

3. *The Kibbutz as a Provider of Services:* In a number of fields, the kibbutz serves as the direct provider of welfare services to its members, in a manner that is often very different from that of outside society. The most outstanding examples of this are in the provision of services to the aged and the personal social services provided by welfare agencies working in the framework of the kibbutz movements.

In the field of personal social services, services are provided by three primary sources—by “ESEK” a non-profit organization of social workers that operates under the auspices of the two main kibbutz movements, by for-profit services run by the kibbutz movements that focus on the needs of specific populations, and by various private sources. The activities of ESEK well demonstrate the providing function of the kibbutz in the field of welfare services. ESEK covers all the personal social service needs of kibbutz members in a majority of kibbutzim. The service is comprised of 80 full and part time social workers (all of whom are members of kibbutzim) who are divided on a regional basis and generally devote one full working day per week to an average sized kibbutz. The social workers work directly with individual kibbutz members or with local committees that deal with different social aspects of kibbutz life (for example, the committee for the aged). ESEK is funded jointly by the kibbutzim (in which its social workers are active) and by the kibbutz movements. Thus, for example, the Kibbutz Haartzi movement covers 50% of the budget. There is no direct funding from the Ministry of Labour and Social Welfare. The only financial support from welfare state institutions is in the form of indirect subsidies in those cases in which the office and transportation costs of the ESEK social workers are covered by regional councils which receive three quarters of their social service budget from the ministry.

An additional source of personal social services are centers that specialize in child development and in rehabilitation that were established, and are run, by the kibbutz movements. These centers provide for-profit services to both kibbutz members and regular citizens (Kaufman, 1982). The costs for services provided to members of kibbutzim are borne entirely by the kibbutzim.

The kibbutzim also receive personal social services from private sources. Members that require services that cannot be provided by the ESEK social workers (in the kibbutzim in which they work) are able to seek professional assistance from outside sources. In such cases, a request for payment will be directed by the member to a committee on the kibbutz. If approved, all the costs of the treatment will be paid by the kibbutz.

Thus, regardless of the form they take, all personal social services required by kibbutz members are covered entirely by the kibbutz and the kibbutz movement.

The kibbutz elderly, and particularly the impaired elderly, are also the recipients of a unique system of welfare provision (Reinharz, 1988). In seeking to deal with a growing number of elderly members, the kibbutz has sought to provide for the needs of these members within the framework of the community. One of the unique features of this effort has been the emphasis upon enabling elderly kibbutz members to continue to play an active role in kibbutz life, and in particular in the sphere of work. In the case of the impaired elderly, kibbutzim have also developed a network of support services that include specially trained kibbutz members, alternative housing options, group-care facilities, special means of transportation and adapted workplaces (Bergman, King, Bentur, Holmes, Holmes and Teresi, 1992). The costs of this elaborate system of community assistance to the elderly is borne almost entirely by the kibbutz without outside financial support.

Conclusions

Whether the kibbutz serves as an intermediary, an enhancer or provider of welfare to its members, the nature of its welfare system clearly places it within the realm of a Totally Decommodified Society (TDS). ° The distribution of welfare services to kibbutz members is determined by individual needs and not by individual earning power. Through a diverse range of external arrangements and internal mechanisms, total responsibility for the distribution of welfare services is in the hands of the kibbutz, thereby enabling the community itself to decide upon the criterion for qualification independent of outside influence, either by the state or non-state welfare state agencies.

Moreover, the conscious dismantling of the connection between the effort and material reward of individuals clearly provides an extreme case of a society in which the individual is not commodified, is not dependent upon market forces to satisfy individual or family needs.

Does this mean that there is no link between market forces and the needs of kibbutz members? Not necessarily. The kibbutz, as a community, is clearly dependent upon its joint earning power in order to provide for the individual needs of its members. In principle, it cannot provide more than the sum of the efforts of all its members. Obviously, in periods of economic difficulties, the ability of the kibbutz to provide answers to needs will decrease. This is what occurred in the late 1980's and early 1990's, during which high inflation rates, a severe drop in government subsidies for agriculture, and mismanagement in kibbutz industries, embroiled the kibbutzim in large debts to banks.

These limitations upon the ability of kibbutzim to maintain a high standard of living for members, coupled with the sharp swing in Israeli social and economic policy towards the free market and privatization (Karger and Monickendam, 1991) weakened support among many kibbutz members for the existing system. As a result, there has been a tendency among some kibbutzim to adopt the "New Kibbutz" concept which seeks to legitimize the concept of inequality on kibbutzim by implementing fundamental changes in a variety of fields of kibbutz life (Shafran, 1992/3). Basically supporters of this concept seek to "privatize" kibbutz life by "allowing market forces and profit considerations to have priority over social and value-related considerations . . . and by granting consumer sovereignty to the area of consumption and need satisfaction" (Rosner, 1992).

However, it appears that the changes in kibbutz society have, until now, been relatively limited in scope and nature. A recent study found that around ten percent of kibbutzim have taken significant steps in this direction. Only a handful have actually sought to link effort and reward (Rosner, 1993). In practice, the emphasis has been primarily upon a restructuring of kibbutz industries, diversification of economic fields of

activity, and greater involvement of outside finance and management. Consumption has primarily been affected by cuts in expenditure and a tendency to enhance individual discretion over non-welfare goods. There has been no significant attempt to change the modes of distribution of welfare services.

Despite the economic crisis and ensuing changes, the kibbutz still remains an example of society closer to the TDS than any other. Being a close-knit, voluntary and relatively homogenous society, the kibbutz has managed to ensure the continued existence of its unique social structure through a high level of social control. While its very uniqueness, its size and history, preclude far-reaching conclusion with regard the welfare state, the very existence of kibbutzim casts doubt upon the notion that large degrees of decommodification will, by necessity, undermine the economic basis of the welfare state.

Moreover, the social and economic mechanisms developed in this society should serve as a subject of research for social scientists and practitioners seeking to enhance the levels of decommodification on the state and community levels.

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