

Aging worlds in contradiction: gerontological observations in the Mediterranean region

By *HANS-JOACHIM VON KONDRATOWITZ**

Abstract

This article discusses the existing and developing aging regimes in the Northern and Southern rim countries of the whole Mediterranean region which are all undergoing considerable social and political transformation processes. It is argued that several eye-opening theoretical interventions for such a gerontological project may lead to some methodological problems and pitfalls, which have to be dealt with productively. Central collective concepts of such an analysis (as the change-oriented “modernization effects” of societal aging and the continuity-oriented gaze at the “unity of the region”) have to be reconsidered and ought to be more differentiated in order to allow smaller social entities (such as kinship and community systems and their connectivity) to be central orientations for analyzing poverty and care management in old age in the Mediterranean region. How to reconnect such a rather micro-political agenda with large processes and big structures of aging policies in the region however still remains an open question.

Keywords: modernization, welfare states, culture/s, differentiation, Mediterranean region, Southern Europe, aging regimes.

* *Hans-Joachim von Kondratowitz*, German Centre of Gerontology (DZA), Berlin, Germany

Exploring Social Gerontological Research in the Mediterranean Region

To be active in the domain of gerontology came to me rather as a surprise, as an unforeseen turn of my professional build-up in sociology. Up to my first encounter with gerontology starting in 1978, I was more concentrated on debating and challenging evidence and assertions of social history, social systems theory, organizational sociology and sociology of knowledge. Then, during an extended qualification stay in Ann Arbor, I was for the first time introduced to this new and multifaceted field consisting of different social science approaches and presented as “gerontology,” in which I have been actively engaged since. Its special attractiveness for me always rested not only in the blending and negotiation of methodologically diverse theoretical approaches but also in the more direct confrontation with urgent empirical issues and problems.

From there on, it has been my prime interest to engage myself most of all in border-crossing contacts and to develop perspectives for international comparative research in gerontology. Among those orientations, the development of socio-gerontological expertise in the Southern European countries has caught my special attention for some time; an interest which has been intensified recently by visits and careful observations in different countries there. The dynamics of social gerontological inquiry in Europe demonstrates that relevant social science research from the Southern European countries, such as Portugal, Spain, Italy, Malta and Greece, has developed stronger than ever. Such advancements have also complemented and reweighted the traditionally powerful medical and geriatric traditions in all these countries. In the aging field, these scientists and social workers have organized and stimulated many new and comparative approaches in family, social network, community and welfare-state research.

An inter-European social research group has aimed at making some of these developments and their results more visible in a comparative manner. Its ambition has also been to extend this perspective to the dynamics and crystallization of the aging process in the *whole Mediterranean region*. Therefore, aging in the Southern Arab and Turkish shore countries has been considered empirically and included in the analyses of the research team (Troisi & Kondratowitz 2013a).

Such an undertaking to enlarge research perspectives needs a plausible justification. It can be found in the complex theoretical framework, which will operate as the basis for the “eye-opening” experience in giving incentives for gerontological analyses. In other words, in order to develop a promising strategy for research, it is helpful to check the following four options in the theoretical repertoire and to distinguish different levels of concern.

- a. For the level *long periods* and *large processes* characterizing the Mediterranean basin, the theoretical perspective lies in the important heritage of a *histoire totale* (*total history*) as elaborated by the French *Annales* School (Revel & Hunt 1995). This interdisciplinary program has served as an attempt to analyze long periods of social and economic history in cooperation with the analysis of social structures by using the idea of different acceleration passages of historical time for distinction. Beyond historical-demographical research, research on changes in images of old age and their persistence would be gerontologically highly relevant.
- b. Another eye-opening experience has been the presence of theoretical and empirical work in *social and cultural anthropology*, in particular by their numerous and comprehensive studies on kinship systems in comparative analyses (Sahlins 2013; Schweitzer 2000). The critical position of the aged in these contexts, their supportive roles in family connection and their rather jeopardized role in case of manifest dependency has been discussed and researched for the Mediterranean region.
- c. *Discourse analysis* has a particular relevance for analyzing dynamics in the Mediterranean, especially for its highly relevant concept of *Orientalism*: a way of imagining, emphasizing, exaggerating and distorting differences of Arab people and cultures as compared with those of Europe and the United States (Said 1979, 2003). It has often involved seeing Arab culture as exotic, backward, uncivilized and, at times, even dangerous. Stereotyping in this orientalized vein has pictured the aged as “wise elderly” and as mentors, retreated from society, but experienced with knowledge about special secrets in the conduct of life (Orientalism 2015). It would also imply the analysis of implicit power structures and the lasting impact of social class in these contexts.
- d. In working with the Mediterranean setting, specific eye-opening experiences are produced by the debate about *post-colonial studies*.

In this view, modernity seems to create quite different dynamics of distinction and it favors divergent formations of civilizations. S. N. Eisenstadt describes this whole process of multiplication as “a story of continual development and formation, constitution and reconstitution of a multiplicity of cultural programs of modernity and of distinctively modern institutional patterns and of different self-conceptions of societies as modern – of multiple modernities” (Eisenstadt 2006). Its radical consequence of an “untranslatable alterity” (Krishnaswamy 2008) would question any possibility of meaningful comparative work among the two parts of the Mediterranean. In this complex region, modernization in the field of aging can therefore be expected to take shape simultaneously in a quite contradictory and multifaceted way (Troisi & Kondratowitz 2013a).

It is the objective of this article to discuss not only the productive quality but also the difficulties of *two central concepts* for a gerontologically sensitive analysis coming from these given approaches: *modernization* processes and *unity* visions for this whole Mediterranean basin.

Aging in the Mediterranean Region I: The Paradox of Modernization

Concepts of modernity in use today are clearly challenged by the post-colonial debate (Knöbl 2007). In order to connect the implications of this debate to the subject of aging, certain dominant themes from the relevant literature have been presented as points of orientation and inquiry. One might call it a specific “check list” of social indicators to be looked after in both parts of the Mediterranean (Kondratowitz 2013a; Troisi 2013a):

- Rationalization processes and embedded performance orientations along the life course
- The general demographic outlook for each country as well as in a comparative perspective
- Employment of elderly and societal retirement strategies
- Trends of extending and professionalizing service deliveries in the areas of health and care
- Strategies of social control and assuring security for old age

- Long-term migration trends along the life course from countries and regions
- Continuous religious affiliations of its population over the life course
- The complex family dynamics in respect to the position of the elderly
- Advances in gender positions and aging
- Media and telecommunications impact with respect to old age
- First processes of increasing democratization and consequences for the societal position of the aged

All these indicators have been based on evidence from a theory of *reflexive modernization* as it has been notably put forward, for example, by Beck and Giddens (Beck et al. 1996; Giddens 1990). Its formulation has been already in critical distance to the classical modernization approaches with its structural–functionalist background (Kondratowitz 2013a). In these classical approaches, aging has been addressed as a consequence of an epochal demographical transition with decreasing fertility and developing longevity patterns with important social impact on education and gender positions. Such a perspective has had a tradition with a special emphasis on the countries of the Southern rim and has been elaborated, for example, in studies of the French Institute for Demographic Studies (INED) in Paris (Courbage & Fargues 1992; Lerner 1968). Other socioeconomic observers have described modernization deficits by stating a sharp divide between the two rims of the Mediterranean Sea: Northern rim countries characterized by low fertility rates and quite a high standard of living (including relatively fair conditions of life for the aged except for poverty groups), contrasted to Southern rim countries with still high rates of population increase, but a comparably weaker economic standing and very insecure life conditions for the aged (Rees et al. 1996).¹

¹ Constructing the field of inquiry as “Mediterranean region” requires an extra effort to mobilize information and data along this specific regional definition. The usual data collections of World Bank, UN, WHO, OECD, etc., do not follow this cultural understanding, but normally group data together according to geographical or political criteria (e.g. the grouping of “MENA-countries,” which means Middle East North Africa countries).

As is well known, arguing with a modernization approach in any gerontological publication is irksome: modernization has been a prime example of misperceiving the position of the aged as potentially powerless and as being subject to discrimination. There are however more fundamental reasons to reflect about the traditions and dynamics of the modernization paradigm. In his Russell Sage lectures, Charles Tilly has identified several “pernicious postulates of twentieth century social thought.” In his words, these assumptions state: “. . . the main processes of large-scale social change take distinct societies through a succession of standard stages, each more advanced than the previous stage. . . . Differentiation forms the dominant, inevitable logic of large-scale change, differentiation leads to advancement . . . The state of social order depends on the balance between processes of differentiation and processes of integration; rapid or excessive differentiation produces disorder . . .” (Tilly 1984).

However, they are altogether misleading. As he discusses in more detail: “stage theories” (e.g. Rostow’s economic growth theory) only pretend an internal coherence and standardization, but often this assumption dissolves in empirical tests. And most importantly: while differentiation is undoubtedly an important process of change, nevertheless “. . . many of the fundamental changes in our era actually entail de-differentiation . . .” (Tilly 1984), understood here as long-term expanding generalizations of similar characteristics. “Many social processes involve de-differentiation: linguistic standardization, the development of mass consumption and the agglomeration of petty sovereignties into national states” (Tilly 1984). In times of globalization, an increase in media stereotyping influences and communication technology effects could be added. Therefore, this simultaneity of global de-differentiation and, for example, further differentiation in aging situations may produce several “layers of differentiation” with diverging long-term or short-term ranges – a process to be followed with the “check list” above. This would be a program for future research strategies.

Since it is not possible here to go deeper into the details of such research, it might be worthwhile to point to an additional dimension: the implicit political use of the Mediterranean agenda, in which the topos of modernization and aging plays a decisive role (Revel & Levi 2002). Looking at the researchers of our group, one can see an apparent two-sidedness of argumentation. There has been a clear disparity in the *self-representations*

between social scientists from the Northern and Southern rim concerning modernization effects of aging. It is striking that all contributions from the Southern shore seem to favor a quite hopeful and reaffirming image of modernization for the aging phenomenon in their countries. When these observers render critical comments, such criticism centers predominantly on successes of ongoing modernizations not yet realized. And their disenchanting comments often signal social and political frustrations about delays and opposition (Arun 2013: 320–321; Courbage 2013: 206–209; Gouiaa & Sibai 2013: 356; Kronfol & Sibai 2013: 339–341). One is therefore inclined to see this as a clear votum for distinct changes in the overall life course regimes in these countries, including old age. “Modernization” turns out to be almost a formula for conjuring societally just and progressively minded aging regimes.

Somehow this stands in contrast to the mostly cautious skepticism and critical views on missed policy opportunities from which several contributors of the Northern rim have tried to translate such modernization effects into political strategies of implementation (Chiatti et al. 2013: 247–252; DaRoit et al. 2013: 164–168; Lopes 2013: 226–229; Simonazzi & Deriu 2013: 116–118; Triantafillou & Mestheneos 2013: 137–141; Viazzo 2013: 25–27). Another group of Northern shore contributors interpret modernization in their countries rather as still unfinished business to be further developed within a new design for a welfare state dominated by the societal impact of aging (Troisi 2013b: 289–292; Yecovich 2013: 267–269). Therefore, these discrepancies reflect not only different degrees of mobilization of social and medical expertise in the Mediterranean region but also different institutional conditions to process and implement such specialist knowledge into the wider political arena. Moreover, modernity seems to create quite different dynamics of distinction, and it favors divergent formations of a potential civilizational impact of aging.

Therefore, in the complex Mediterranean region, modernization in the field of aging takes shape in a quite multifaceted way and forms new shapes of aging regimes. The Southern-shore countries are characterized by a considerable lack of qualified jobs necessary for ensuring full employment of any age and gender, and this in a demographic situation with a still high fertility (which will not last in a longer time perspective). In these societies, formal employment is not a dominant feature and moreover is

often state-connected. People are provided with pension schemes, often in need of urgent reform, and with no post-retirement strategies; at the same time, unregulated and low-paid informal work structures prevail, which will not allow systematic savings for old age. In addition, such regimes are still care-centered and make use of the dominance of nonprofessional family and community care, but by qualifying services by a developed gerontological expertise (as e.g. in Tunisia and Lebanon) (Troisi & Kondratowitz 2013b).

Aging in the Mediterranean Region II: "Unity" as an Obscured Vision

Why does this idea of an essential unity exist on both shores of the Mediterranean Sea, denying any essential rift between the two parts? Looking at its intellectual heritage, for the historian Fernand Braudel in the *total history* tradition, the idea of a *unity* of the Mediterranean has been central in designing and deciding the method of his famous study on the Mediterranean world (Braudel 1966). Such a perspective would assume that there is a general comparability across quite a variety of historical periods and places in this world region under observation. Moreover, "unity" implies that there would be an implicit consistency in integration modes and in commonly shared values. Even the wide distribution of plant vegetation (such as olive and palm trees), and of geographical characteristics such as certain coastal structures, have been brought in as markers of similarity. Unity perspectives on the Mediterranean however also mirror a level of imagery, of social and cultural constructions and circulating myths, which all center on sharply contrasting the creative, flexible and imaginative "South" with the cold and rational "North" of Europe (Kondratowitz 2013b).

These ideas have not remained unchallenged. Several observers have been dissatisfied with the determinism of Braudel's work, which always included geographical studies, vegetation research and climate history (Horden & Purcell 2000; Tilly 1984). These critics would look at the Mediterranean as a network of micro-regions, of "micro-ecologies," seen as an arrangement of loosely connected, but quite diverse entities (Horden & Purcell 2000, Part Two). These ecologies constitute a rather fragmented landscape with a profoundly uncertain environment and an unpredictable

climate situation. This asks for consideration of the “connectivity” between such micro-ecologies in order to find similarities and differences (Troisi & Kondratowitz 2013a). Economic and social exchanges, intensive maritime traffic in commerce and interactions in and between several micro-ecologies are means of demonstrating this quality by coping with the risks of an ecologically fragmented world. Particularly in the social sciences, there was skepticism toward such propagators of a unity of the Mediterranean (Aboulafia 2011; De Pina-Cabral 1989; Marino 2002). In contrast, there was an increasing tendency to point to the forces of *differentiation*, to an apparent logic of developing diversity in physical and social dimensions of this region.

This reencounter of the figure of differentiation has often been connected to the myth of a Mediterranean *culture* as a conceptual bridge for standardizing somewhat similar social complexes and appearances (Kaser 2014; Steinberg 2002). Usually there are three characteristics named as alleged “culture traits” of the Mediterranean in both parts, sometimes summed up as a “Mediterranean paradigm” (de Pina-Cabral 2013) with repercussions for the situation of the aged:

1. Existence and attribution of certain strict moral codes for the regulation of everyday life – the dominance of “archaic” gender-based conceptions of male *honor* and its compliment female *shame* from preindustrial times have been studied critically (Albera 2006; Gilmore 1987; Lisón-Tolosana 2001). Anthropological critics in an orientalist vein see this claim rather as a particular way of Northern and Western countries to stereotype the Mediterranean countries as especially backward oriented, anti-modern and as questioning their ability to reform society because of these supposedly deeply rooted value orientations (Gilmore 1987; also cf. the discussion of “mediterraneanism” in Herzfeld 1987).
2. The strong *familialism* is seen as another dominating element of such culture in all its aspects and consequences for the aged:
 - the highly regulated social fabric of positioning family and kin members hierarchically and collectively, making individualistic options of privacy extremely difficult to realize;
 - following marriage strategies of relatives and kin, with early marriages for women resulting in large age differences

- between spouses, also including considerable decisions in favor of endogamy;
- promising emotional and economical security in intergenerational and wider community networks of villages and neighborhoods;
 - the existence of patronymic associations of patron–client, non-kin relationships which might develop into local *clientelism*, acting as patron–client relation and/or making use of direct access to public means for private aims (Georgas 1989; Inglehart & Baker 2000). However, empirical evidence for strong “modernization pressures” on this type of familialism is particularly well documented for the Southeastern European family (Kaser 1995).
3. The everyday confidence in smaller networks and their informal capacities for support might be responsible for a potential lack of “public spirit,” and more so, a rather stable feeling of *distrust against anonymous institutions* and *large-scale bureaucracies*, foremost against a dominant power position of the Catholic or Orthodox church, but most of all against the regulating impact of a central or local state (Kaser 2014).

Despite research on such a questionable concept as “culture,” the quality of uniqueness of societies nevertheless remains of importance for empirical comparative work. Most observers agree that it is worthwhile to concentrate first of all on societies as historically unique entities, which nevertheless may have developed quite different solutions for similar problems. Comparative work ought to concentrate particularly on this uniqueness of societies, which are ever more characterized by an increasing uniformity and “de-differentiation” in an age of globalization (Sztompka 1988). As one way of approaching this uniqueness, Scandinavian sociologists (Knudsen 1999) have introduced the term of “deep culture” in order to signify characteristic attributes in the collective consciousness of the inhabitants of a certain region, nation-state or alike, which has been formed and solidified over time. As traditions and consistent value settings, they have the potential to function as “path dependencies” of the analysis of welfare states.

In what respect the conceptual framework of “culture” (in whatever definition) will be empirically convincing is a matter of designing

appropriate research strategies. Using comparative SHARE data, Litwin has shown that cultural dimensions play a certain role in establishing bonds in old age. His recommendation has been that the social networks of older people should be seen within their unique regional milieu and in relation to the values and social norms that prevail in different sets of societies (Litwin 2009). Research based on the Immigrants and Retirement Survey (PRI) in France (Attias-Donfut 2013; Attias-Donfut et al. 2006) has allowed us to point to life choices of different aged migrant groups not only in respect to, for example, their religious beliefs and preferences but also with respect to the intensity of social connections that shape the choices of their transnational behavior. Therefore, it is obvious that using “culture” in empirical aging research needs to be specified according to local or regional conditions and normative settings. This will be necessary especially in the case of *elder care*, which in some Southern rim countries already is of prime importance as mentioned in the conclusions from the project (Troisi & Kondratowitz 2013a).²

However, in light of recent political and social ruptures, whether the *unity* perspective for the Mediterranean will continue to work as the basis for empirical social research remains an open question. Today, arguing in favor of this “unity” often serves as a unifying ideology of intellectuals from the Northern rim to essentially distance world regions, particularly Central and Northern Europe as contrasted to the Mediterranean region (Kondratowitz 2013b).

Departing Worlds? Musings of an Aging Gerontologist

Born and growing up in a cutoff spot on the central European landscape called West Berlin, I was for endless years confronted with the existence of borderlines around me. To get out of this closed shop and to start breathing again had to be my imperative decision. Involuntarily blessed with such an escapist biographical urge, it has been my prime interest to engage myself most of all in border-crossing contacts and to develop

² As an example for such regionally centered analyses of the respective care situation in Egypt, cf. Boggatz 2011, using data sets from a Coptic-orthodox background. However, the study was written before and in the early revolutionary times and would need also a reassessment under the new political conditions.

perspectives for international comparative research in gerontology. Once more seeing resentment strategies and neo-nationalism taking over is a highly unwelcome encounter with a past long imagined as over, once and forever.

At the moment, the perspectives in the Mediterranean region can serve as a prime example of these distortive processes of mutual border setting. This has been shown above also in testing the “eye-opening” theoretical approaches: central collective concepts in use, as the change-oriented “modernization effects” of societal aging and the continuity-oriented gaze at the “unity of the region,” have been shown to be conceptual decisions which could not help to grasp the social dynamics of aging there. They ought to be more differentiated in order to allow smaller social entities (as kinship and community systems and their connectivity) to be central orientations for analyzing poverty and care management in old age.

Therefore, returning to the old divide between the “North” and “South” of Europe means following a long tradition of mutual mystifications and unfulfilled expectations for change. Several attempts to establish programs and agreements between Southern EU countries and Non-EU countries of the Mediterranean region have not been successful. Movements for a “Mediterranean Union” fell through not only because of different interests inside the EU but also because they could not offer any lasting political solutions for hot topics such as Israel and Cyprus (Kondratowitz 2013b). During the ongoing *Euro-crisis* the European welfare states of the Northern shore and their socioeconomic determinants have now been at the center of attention, clearly distracting considerations away from the problems of the Southern-shore countries, contributing to a further mutual alienation. Instead, several countries have been subjected to military interventions from outside forces.

This blatant incompetence to negotiate any Mediterranean cooperation has certainly helped to accelerate the violent uprisings since 2011 in most of these Southern-shore countries, which all have demonstrated an extraordinary degree of disillusionment and frustration. This has also enormous pressure on the life courses of people and how they perceive themselves. The economic hardships of unemployment and absent job perspectives for younger cohorts have been discussed for some time in both parts of the Mediterranean region (Dhillon & Yousef 2009; EUROSTAT 2015).

However, now the aged have come more into the center of attention as a justified new subject in world perspective. They have been perceived predominantly in a context of increasing poverty and in desperate as well as in needy life situations. This has given a surprising rise to more intensive gerontological expertise from internal and international sources in several countries, such as Tunisia and Lebanon, in order to study family relations, given support structures and health policy imperatives.

Another open question remains: in what way are there signs of an aggravation of intergenerational conflict, which often has accompanied revolutionary upheavals and has materialized in the public arena? For the members of the young unemployed middle class, in many Southern rim countries, "old age" seems to stand for the continuous experience of power abuse, of venality and corruption, of privileges and patronage of long-term social elites from the upper and administrative class and from the military. Demonstrating a secure economic standing and belonging to a certain age cohort could bring especially older men into immediate suspicion of participating in the forgone dictatorship, as a direct supporter or at least as being a protégé of the overthrown rulers: the "Varnish-despots," who tried to give a signal of eternal youth by darkening their white hair with black shoe-polish (Kepel & Rupnik 2015). In the aftermath of the Tahrir uprisings in Egypt, reports from direct activities of younger students and neighborhood groups of youth, connected by social media, have also demonstrated this critical attitude toward older elite members and community elders (reports by J. Winegar and T. Swedenburg in: Sowers & Toensing 2012; Kondratowitz 2013c). On the contrary, the experiences of civil war, the continuous destruction of neighborhoods and threats of family dissolution, mostly in Libya, Syria and Lebanon, seem to have produced a new spirit of direct intergenerational cooperation and the establishment of community support – here and there even by establishing initiatives to help bridging clan, tribal and religious separations.³

³ At the moment, one possibility to get more detailed information about the present situation of the aged (particularly in the "failed states" of Libya and Syria) would be to check the objectives and activities of internal help and support groups in Southern-shore Mediterranean countries (for Syria e.g. the reports and activities of Adopt-a-Revolution: adoptrevolution.org) as well as to study respective HelpAge-International projects (if available) in some of these countries (e.g. for Gaza

But several observers are not content with merely deploring the existing rifts. In the whole region, ideas of withdrawing and preaching a self-sufficient existence as national societies in a populist vein have gained in influence. Resentment production is on the rise. The most bizarre example of such reflections has materialized in the debate about the founding of an Anti-German “Latin Empire,” supposedly consisting of France, Spain and Italy – at least in the eyes of Giorgio Agamben, its architect, in following old plans of the philosopher Kojève of 1945 (Agamben 2013; Howse 2004; Lepenies 2013). Such ideas for the EU members of the Northern shore countries reflect not only a culturally and historically defined separation but also present an apparent economic division in conducts of life and of maintaining welfare-state securities.

Meanwhile, intellectually blueprinting new empires on the map of the Mediterranean has not only been a privilege of Agamben. Now the Islamic State is trying militarily to form a new Islamic state in Iraq and Syria. In order to prove its legitimacy, the Caliphate claims even to care for the elderly in its sphere of influence. Thanks to the pamphlet of the first female Islamist group, the Al-Khanssaa brigade of 2015, one can learn about the Home for the Elderly (men!) in the Nineveh province of Northwestern Iraq. “The State tries to stop men and women to prevent it [gender mixing] as much as it is possible. . . . The Caliphate has also cast under its cloak the elderly, men and women. Its slogan reads, ‘there is none among us who is not merciful to our small and respectful towards our elderly’ ” (Women 2015).

What seems quite familiar at first sight nevertheless has an undertone: respect declarations as a disguise for a hidden contempt against aged men as useless dependents no longer able to productively participate in the expected victory. A quite worrying outlook for old age to maybe only be used as the “last reserve” in the final battles of the Caliphate. We know by experience that several dictatorships in decline have done so before.

strip/West Bank-Palestine occupied territories). However, as a first review of all the civil and social group contacts for Mediterranean countries (available via the Anna Lindh-Foundation Euromed) demonstrates: the topics of engagement they discuss concern almost exclusively children, youth and women, and educational opportunities and medical service facilities for these groups.

But what if this Islamic state – contrary to expectations – is rather solidifying as a new political force in that region? At any rate, the aging regime looming here promises to be a rigid and authoritarian rule that will affect all social and generational relations in these areas.

Corresponding Author

Hans-Joachim von Kondratowitz, German Centre of Gerontology (DZA), Manfred-von-Richthofen-Straße 2, DE-12101 Berlin, Germany. Email: hans-joachim.kondratowitz@dza.de

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