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Editorial

This issue features a wide variety of articles. While each is devoted to a separate topic, they span the gamut of possible subjects sociology can study, from religion to economics, and together offer a colourful palette of some of the sociological issues of special relevance today. While we have not quite succeeded in maintaining the East-West balance of authors we endeavour to have in each issue, this issue's authors represent a fine balance between more senior and seasoned researchers on the one hand and talented up-and-comers from the younger generation of sociologists on the other, and that too is a part of our mission.

Georg Vobruba open's this issue and writes about the European Social Model in an effort to 'deconstruct' the contradiction between globalisation and the welfare state. He argues that the two can be seen as mutually supportive. By providing the national welfare states with enough financial resources globalisation secures its own sustainability. But in fact, globalisation endangers the national welfare states in another sense. Welfare state retrenchment, publicly justified by globalisation, is likely to lead to resistance against globalisation, diminishing its economic potential, and thus bringing about reasons for further cutbacks of the welfare state – which endangers the national welfare states, too.

Zdeněk R. Nešpor describes religious processes in contemporary Czech society, which to date remain seriously understudied in terms of the massive de-privatisation of religions and the de-secularisation of societies. The author claims that the trends in Western and Eastern Europe have both similar and dissimilar features. The former include the out-of-church movement and even strong anticlericalism, de-traditionalisation and the rise of new spiritual outlets. The latter refer to the degree of de-privatisation of traditional Christian faiths, which is a reaction to the over-secularised suppression of the public sphere under the Communist regime, and even before that time.

Tomáš Katrňák, Martin Kreidl and Laura Fónadová analyse trends in educational homogamy in Czech society from 1988 to 2000. On the one hand, analyses of vital statistics data on new marriages do not confirm the hypothesis that educational homogamy strengthened as a result of growing economic uncertainty during the 1990s. On the other hand, data have substantiated the second hypothesis that educational homogamy is much higher among younger than older couples. Some possible explanations for the lack of a trend in homogamy are discussed.

Ladislav Rabušic deals with the politically important topic of retirement. He asks about what kind of perspective Czechs have on the timing of their retirement and whether they are beginning to prepare themselves for the eventuality of having to retire much later than has thus far usually been the case. In fact the opposite is true, as surveys reveal there is a paradox in early retirement. Confronted with an

ageing society, longer life expectancy and potentially decreasing pension benefits, middle-aged and elderly Czechs nonetheless oppose any increase in the statutory retirement age and more frequently indicate a preference for early retirement. At the same time, many of those who are already retired today admit that they did not really want to retire. The article tries to find an explanation for this paradox in the 'mentality of retirement'.

Jan Drahokoupil presents an example of an 'unsuccessful' attempt on the part of the Czech Republic to lure foreign capital to Brno. The story of Flextronics - a subsidised investment of a transnational corporation in the Brno region, which ended only two years later – is indicative of some post-Fordist transformations of capitalism and capitalist governance. Using this example as a case study, the author attempts to re-think the theories of post-Fordism in order to theorise about the particular local articulation of capitalism(s) in East Central Europe. Further, he draws some conclusions about the relationship between the company, state, and municipality in the post-Fordist environment in the Czech Republic.

Finally, Marek Skovajsa reviews some theoretical suggestions concerning the conceptualisation of economic culture, which have been presented in a fruitful series of publications on the cultural dimension of post-communist transformation, issued by the Institute for Research on Eastern Europe in Bremen. The author of the review focuses on the points where culture on the one hand and institutions, social capital and civil society on the other overlap and where they differ. The article concludes that economic culture is a conceptual category in its own right, which is not reducible to either the level of institutions, or that of social capital or civil society. If used as a tool for explaining socio-economic processes, a strict separation of the economic culture of other concepts is required.

Among the contributions to this issue I would like to draw readers' attention to Tomáš Kostelecký's report in the information section on the research colloquium held in honour of Michal Illner, the former director of the Institute of Sociology, on the occasion of his 70th birthday. In addition to managing the daily administrative tasks of running the Institute in the 1990s, Michal Illner continued to productively pursue his own research on local democracy and regional development. On behalf of the CSR Editorial Board and the entire publication team I would like to express best wishes to Michal Illner on this special occasion and for continued success in the future.

Jiří Večerník
Editor-in-Chief

Globalisation versus the European Social Model? Deconstructing the Contradiction Between Globalisation and the Welfare State

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Abstract: Both the economic mainstream and the public debate address globalisation and welfare states as strictly contradicting one other. In contrast to this view the article points out that there exists a globalisation dilemma: globalisation both endangers and requires the welfare state. How can this dilemma be solved? This question leads to an assessment of the degree to which globalisation in fact undermines the welfare state and to the question of what strategies for social policy might alleviate the social costs of globalisation, hence absorbing the opposition to it.
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Introduction

The dominant public interpretation of globalisation has changed. There is now a growing body of literature offering advice on how to challenge globalisation in everyday life, predicting the 'irresistible rise of global anticapitalism' and issuing the ominous warning 'we are everywhere' [*Notes from Nowhere* 2003; Roddick 2001]. Mirroring this, there are also growing numbers of statements, articles and books endeavouring to provide counter-arguments in globalisation's favour [cf. Norberg 2003; World Bank 2002]. Globalisation has found itself on the defensive. What happened?

Globalisation has turned from being a material constraint into a 'hate-term', mutating from its role of describing an unavoidable tendency occurring within capitalism into a symbol of a conspiracy of the elites against the people. It surfaced out of pure economic logic and turned into a subject at the centre of political decisions and conflicts. That it is possible to oppose globalisation has become clearly visible. The perception thus currently gaining ground is that globalisation not only is a danger, but also is *in* danger.

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Two brief terminological remarks

First, what is economic globalisation? Most definitions of the concept focus on different aspects of the 'intensification' of 'worldwide' relationships [cf. Giddens 1990: 64; Held et al. 1999: 14f.; Keohane 2003: 130]. As such, economic globalisation must be defined as the intensification of economic exchange and competition by means of the worldwide spread of markets for goods, services, capital and labour. But by focusing exclusively on institutional matters this definition fails to pay enough attention to the fact that globalisation is a publicly interpreted fact. It misses the character of globalisation as a social construction with political consequences.

Consequently, any proper definition should meet the following requirements: It must focus on the perspective of institutional change; it must provide an opportunity to link this perspective with individual and collective actions, either as causes or as consequences of this change; and it must refer to the public use of the term and its effects [cf. Therborn 2001: 450]. The social sciences must deal with globalisation as a practical social construction, a fact that requires making second order observations: social scientists must be able to observe how the relevant actors observe. For this reason I propose a two-level approach to globalisation. I define economic globalisation as the intensification of economic exchange and competition, which leads to an intensified interdependency between distant living circumstances, spurring the growing entanglement of interests, of which people worldwide become increasingly aware.

Second, how to conceptualise the European social model? This too must be elaborated at two levels. At one level a description is required of the institutions that typically enable the patterns of action characteristic of the European social model. But why is this a basic requirement? If we agree that explaining institutional social change means referring to individual action – which itself is framed by institutions – then the impact of globalisation on a social model must eventually focus on the micro-foundation of the nexus between globalisation and national institutions. Thus the question is: how does globalisation influence institutions and consequently also characteristic patterns of action. At the second level it is necessary that one take into account that constructing a European social model is not just an academic affair. At least to some degree, political and social actors within society themselves think and speak of a European social model, identifying with it and linking certain consequences to it. "The European Social Model, [is] characterized in particular by systems that offer a high level of social protection, by the importance of social dialogue and by services of general interest covering activities vital for social cohesion..."[1] When we speak of a European social model then, we are again in the realm of second order observations. As a consequence, there are two basic strands of research: one is to describe the main characteristics of the European social model, the-

[1] European Social Agenda. In: Presidency Conclusions: Nice European Council Meeting, 7–9 December 2000. [Quoted from Vaughan-Whitehead 2003: 4]

orising about their interrelations and pointing out their consequences; the second is to raise the empirical question of whether the relevant actors make reference to a European social model, how they describe it, what they attribute to it, and how they act according to their understanding of it.

Notwithstanding the huge organisational variety, state-provided social security is – and is seen as – a common institutional feature in Europe [cf. Gough 1997]. Social security has a critical impact on individual action: it reduces the unpredictability of an individual's future with respect to one of its most important dimensions – the material preconditions of individual existence. By mitigating immediate economic constraints it provides a certain long-term perspective for individual action [cf. Vobruba 1991]. In this respect, European welfare states contribute to a certain long-term orientation built into the European social model [compared to the US; cf. Vobruba 2001]. Social security reduces constraints and provides people with additional room to manoeuvre in.

In this paper I shall argue that this impact social security has on individual action is crucial for the capacity of the European Social Model to cope with globalisation – and vice versa: economic globalisation crucially depends on the welfare state's capacity to absorb 'its discontents' [Stiglitz 2002]. Globalisation needs to be protected against itself.

Globalisation: A historical trend that might be interrupted

The idea of globalisation and the notion of where it takes place – the 'world society' – are as old as modernity itself. The term first came into use as a normative orientation within philosophical discourse. Kant was able to present his *'weltbürgerliche Absicht'* [Kant 1912–23] as an optimistic moral project, just like 'proletarian internationalism'. The emergence and development of capitalism led to the process whereby world-society was realised. Thus, the normative idea of a world-society came to be accompanied by real-globalisation. Not very surprisingly, real-globalisation distorted the central normative hopes of the idea of a world-society, as real-globalisation did not at all lead to a global community, implying a potential for global solidarity, but rather triggered new conflicts of interests. *"So gab es denn eine Weltgeschichte und ihre populären Deutungsmuster, die nicht mehr auf die Welt paßten, und eine Praxis globaler Integration, die unerklärt blieb."* [Bright and Geyer 1994: 16] Economic globalisation is neither something entirely new, nor has it developed with extraordinary speed. It is also important to note that what we are now facing is the second wave of globalisation within the development of capitalism – following the severe decline of the first and several decades of nationalistic isolationism in between [cf. Borchardt 2001].

Hirst and Thompson [1996] collected data in an effort to describe the processes involved in the transnationalisation of national economies since the 19th century. If the volume of foreign trade is taken as an indicator, it is possible to see that

transnationalisation was steadily increasing up until the beginning of the First World War. It stagnated between 1913 and 1929, and broke down over the course of the world economic crisis [cf. Held et al. 1999: 157]. It was not until the end of the Second World War that world trade began to recover [cf. Hirst and Thompson 1996: 22]. The 'relative openness' of important national economies, defined as the volume of foreign trade (exports plus imports) in percentages of GDP, has steadily increased since 1950, but not with spectacular speed. In 1973 it was still on a level lower than in 1913 [Hirst and Thompson 1996: 27, 28; cf. Yeates 2001: 35].

Data on migration to the United States – the world's most important migration destination – reveal features similar to the data on trade. Since the end of the 19th century migration has rapidly increased, both in absolute numbers and in relation to the population in the United States. At the time of the First World War migration reached its absolute peak and then declined dramatically between the wars. Not until the middle of the 1950s did migration rise again, but in absolute numbers, as well as in the percentage of population migration to the United States, it is far from attaining the dimensions it possessed in the first two decades of the 20th century [Hirst and Thompson 1996: 26].

Although foreign trade is still an important force in transnationalisation [cf. Nofal 1996], since the 1960s it has been increasingly superseded by foreign direct investments (FDIs). One emerging feature is that the volume of worldwide foreign trade is increasing faster than GDP, and foreign direct investments are increasing faster than the volume of foreign trade. Foreign investments are supplanting foreign trade as the main force in economic transnationalisation [cf. Hirst and Thompson 1996: 54, 55; Messner 1997: 134]. Compared with foreign trade, the significance of the rapidly growing volume of FDIs lies in the fact that they are more likely to endanger the autonomous space for political manoeuvring and that they are more difficult to regulate.

Foreign direct investments are highly concentrated processes in a two fold sense. First, one-third of all FDI stocks are under the control of no more than 100 multinational companies [Hirst and Thompson 1996: 53]. Second, the lion's share of all FDIs flow from highly developed countries to highly developed countries [cf. Yeates 2001: 37]. Thus, the observation of globalisation in a long-term historical perspective draws attention to three important points:

1. Not just theoretical arguments but also empirical evidence exist to indicate that globalisation is a tendency inherent to capitalism. In the very long run, globalisation seems to be a steady economic trend in the modern capitalist world society, but it can be interrupted.
2. Though globalisation was never, in its history, an automatism, but rather was spurred on by political decisions, this feature has nevertheless become more visible to the public owing to several basic decisions and treaties (NAFTA, EU, MERCOSUR) which have been reached in the recent past.
3. Even if, with regard to individual countries, the process of globalisation may be unavoidable, in the short run it can be evaded. Participation and non-participa-

tion in globalisation have causes and consequences that can be anticipated and are subject to political calculi and decisions. These features are of crucial importance for the analysis of new qualities in the current processes of globalisation, and in particular for assessing the impact on national welfare states. Later I shall come back to the question of whether globalisation undermines welfare states.

Political decisions in the globalisation process

Participation in the globalisation process ushers in the pressures of modernisation. Rapidly progressing processes of modernisation or transformation give rise to costs that are distributed unequally among people and over time. The unequal distribution of the costs of modernisation among people means that this creates winners and losers. The unequal distribution of costs over time means that in the short run there are more costs, whilst in the long run more gains. What is more, it is almost clear who the bearers of the costs are, whilst the gains appear in a more diffused manner.

Roughly speaking, it is possible to distinguish the following four possible types of participants in the globalisation process:

1. Short-term and long-term winners: they support participation in the globalisation process.
2. Short-term winners who became long-term losers: they barely represent any serious hindrance.

These two types do not cause problems. Quite interesting, however, are those who do represent a difficulty, which are the following two types:

3. Short-term losers who become long-term winners: they give rise to the political problem of bridging.
4. Short-term and long-term losers: they represent the problem of compensation.

A problem typical for processes of modernisation and transformation in society is that the bearers of the short-term costs tend to hinder development in society that could in the long run be to the advantage of all. Participation in the globalisation process in particular can be jeopardised by short-term losers, and hence the society as a whole could miss out on its long-term benefits. Consequently, successful participation in the globalisation process depends crucially on the presumable losers, and on their potential and willingness to oppose it. I will therefore concentrate on types 3 and 4, indicated above, because they are the potential source of the threat to globalisation. The key question is how can the costs relating to globalisation be made bearable and something be offered to the presumable losers.

There are several telling examples for (presumable) losers opposing globalisation. Bismarck's *Schutzzollpolitik* in Germany is a historical case in point. The period of Liberalism ended with the beginning of the Great Depression [Rosenberg 1967]. The claim for the introduction of customs came primarily from the old-fashioned parts of the economy, which were threatened by the world markets, in order to pro-

tect themselves. German agriculture became disconnected from transnational competition and hence could afford to let the modernisation-gap continue to grow. Deficits of rationalisation and high food prices were the collective damage that resulted.

The German case shows also that the politics of national protection against world markets is what triggered the establishing of business associations. The main aim of the German business associations that were founded at the end of the 19th century was the implementation of protective tariffs [cf. Ullmann 1988: 77f.]. The name of the top association, founded in 1876, designated its programme *'Centralverband deutscher Industrieller zur Beförderung und Wahrung nationaler Arbeit'* [Ullmann 1988: 78].

The main concern was protecting the interests of those branches of the economy (the coal and iron industries, the textile industry), which saw themselves as the potential losers in international competition. These interests were embedded in coalitions of employers and employees on a national basis.

The same pattern of conflict can be found in the negotiations of the NAFTA treaty. NAFTA was supported in the United States by the export-oriented modern branches of the economy and opposed by those in fear of being defeated in the competition with Mexican firms [cf. Bolle 1993; Belous and Lemco 1995]. Without coalitions between employers and employees emerging out of this process, the losers' branches would never have had any political influence. It was the poorly educated urban under-classes, already disadvantaged in the labour market, which opposed NAFTA most intensely. Their fears were taken up by Ross Perot, running for the presidency at the time, and integrated into his aggressive, isolationist community rhetoric. He affected to hear the 'giant sucking sound' [Perot 1993] of jobs disappearing in the direction of Mexico.[2]

These days, in 2004, isolationist tendencies are again gaining ground. In the United States, there is a broad debate centring on the issue of 'offshoring', i.e. the job shifting caused by firms outsourcing to low-wage countries like India. Also, polls show significantly declining approval rates on matters of free trade. The US Senate has passed a regulation aimed at impeding the offshoring of IT jobs. In addition, there are proposals for excluding firms producing a part of their offers outside the US from receiving public orders [cf. *Zürcher Zeitung*, 13, 14 March 2004, p. 15; *Financial Times Deutschland* 24 March 2004, p. 4].

It is evident that as world society develops from a humanistic vision into reality, there is an increasing awareness that participating in the globalisation process comes with costs. In order to avoid these costs the presumable losers are likely to oppose all political decisions that result in an intensification of participation in international competition. Thus, for these people the nation-state has become a bulwark against globalisation.

[2] See also the story of the victims and winners in the transfer of jobs from Lower Bavaria to China [*Süddeutsche Zeitung* 27 August 2003].

To make a brief and provisional summary, globalisation causes gains and losses, hence spawning the opposition against it. The present globalisation process has historical precedents, it has been and will continue to be triggered by politics, and it depends on social preconditions. This result challenges the public construction that there exists a contradiction between globalisation and the welfare state.

Of course, there have been contributions to this discussion which have pointed out one or another of these very features. Globalisation has been put into a long-term historical context [cf. Borchardt 2001; Robertson 2003], arguments have been collected that refute the thesis of the powerless state [cf. Cerny 1996; Weiss 1998] and support the thesis of globalisation's social preconditions [cf. Rodrik 1997; Rieger and Leibfried 2003; Vobruba 2001], and attempts have been made to conceptualise globalisation as a social construction [cf. Seeleib-Kaiser 2002; Jordan 1998; Schmidt 2002].[3] But in comparison with the immense body of economic literature, and with the insistence transnational elites put on the contradiction between globalisation and national welfare states, these contributions remain exceptions. And what is more, criticism to date has barely led to any research that would re-conceptualise globalisation.

The need for social policy

For the purpose of the following discussion, I have excluded the possibility that national elites engaged in promoting the participation of their respective country in globalisation can overcome the resistance put up by the presumable losers through non-democratic means. Therefore, the next question is how the losers in globalisation could effectively veto participation in the globalisation process. Within democratic systems capital interests can hardly prevail alone. The political importance of the globalisation-losers derives from coalitions of employers and employees within loser-branches. These coalitions emerge on the basis of the common interest of capital and labour to maintain 'their' firm. This is the reason why representatives of business interests call for protectionism in the name of protection for national labour (*'Schutz der nationalen Arbeit'*). The importance of social policy for rendering participation in the globalisation process feasible is immediately clear. But what are the underlying mechanisms that make social policy a precondition for successful participation in the globalisation process?

The chances to carry through protectionism are based on the fact that workers are dependent on their jobs. Their dependency is as higher, as they are without any alternative for making their living, and hence are forced to oppose globalisation in coalitions with their firms. When this happens, then any room for political ma-

[3] As far as I know, there is still no longitudinal analysis of public perceptions of globalisation, and thus no empirical knowledge about its development. The most elaborate reseach in a cross-national perspective is in Seeleib-Kaiser [2001; 2002].

noeuvring against claims for protectionism can only be based on institutions that mitigate the workers` dependency on their jobs.

There is a theoretical argument about the additional use of social policy, which shows that a classic effect – and potentially even a task – of social policy is that of buffering the negative consequences of the processes of modernisation [cf. Vobruba 1996]. Within the theoretical framework of system theory it has been argued that social policy enforces functional differentiation. In particular, it enables the economic system to focus exclusively on efficient production by shielding it from social requirements [cf. Huf 1998]. From the perspective of the theory of action, social policy as a source of income can be viewed as alleviating individual problems of material existence and mitigating the constraints of the labour market [cf. Vobruba 1991]. Consequently, politics that (at least temporarily) endanger jobs can ameliorate their chances of being tolerated if they (as well as the people involved) are able to rely on social policy [cf. Nissen 1994; Vobruba 2003]. The perspective of the additional use of social policy points to the hypothesis that the success of the political decision to participate in the globalisation process depends on a country's ability to compensate for the costs with social policy. More precisely, the presumable losers in the globalisation process must be able to foresee that their welfare state will provide them with some form of compensation. Historical examples [cf. Rieger and Leibfried 2003] and empirical evidence from international comparative research [cf. Graham 1994] render this hypothesis at least somewhat plausible. It is therefore possible to conclude that social policy adds to the chances of the present process of globalisation being successful and sustainable.

Until now I have been compiling arguments in favour of the thesis that governments need to back their decision to participate in the globalisation process with social policy. But this by no means contributes to clarifying the question of whether they are able to do so. After all, the predominant assumption is that globalisation deprives national welfare states of their material basis [cf. Wilding 1997]. Hence the dilemma of globalisation can be precisely formulated: social policy is one of the preconditions for globalisation, but globalisation undermines national welfare states [cf. Vobruba 2001].

The way out of the globalisation dilemma

In the history of Europe in the 20th century there is empirical evidence that, contrary to the current common view, globalisation and the development of modern welfare states can – in Europe at least – co-exist. The developments of both show some remarkable similarities. The modern European welfare states began to evolve in the last decades of the 19th century and in the early 20th century. After the end of the First World War the development of European welfare states stagnated at the level they had reached up until that point. During the world economic crisis some dismantling of the welfare states took place, varying in degree from country to country. Not un-

til the end of the Second World War did a new phase of expansion occur. The full maturity of the European welfare states is a result of the 1950s and 1960s. Over the past decade the development of the welfare states has stagnated. But, notwithstanding some exceptions, like New Zealand, prognoses about the 'dismantling of the welfare state(s)' [Pierson 1994; cf. Borchert 1996] have been highly exaggerated.

The development of globalisation reveals a surprisingly similar pattern. Within the decades before the First World War there was a rapid increase in international entanglements. The period between the wars experienced a remarkable setback, and then, in the 1950s, globalisation increased again. From that time globalisation was on an upward trend. Finally – not unlike the development of the welfare states – the upward trend flattened out over recent years.

Of course, the observation of parallels in the development of the European welfare states and globalisation only proves that there is no systematic incompatibility between them. In order to show whether the present globalisation dilemma can be solved, a theoretical argument is required.

Is there a way out of the globalisation dilemma? The statement that globalisation destabilises national welfare states renders it necessary to indicate how globalisation affects welfare states. Generally speaking, a welfare state is stable if there is a balance between the resources it can attract and the demands it has to cope with. Its resources consist of contributions and/or taxes, while the demands it faces stem from the level of socio-political payments and the number of cases it is responsible for. Thus the question of how globalisation affects national welfare states can be split into two more concrete questions [cf. Ganssmann 2000: 151ff.]:

1. Is globalisation likely to erode the material basis of national welfare states?
2. Is globalisation likely to cause additional social problems, which the national welfare states are responsible for?

Ad 1. Generally speaking, participation in the globalisation process triggers economic growth. This at least is the basic argument for globalisation. Therefore, *ceteris paribus*, one must conclude that in the course of globalisation a country's yield in taxes and contributions will increase. Certainly an objection could be made that this *ceteris paribus* assumption is unrealistic. It might be stated that national governments are forced by economic globalisation to reduce taxes and contributions. This is a common objection, especially with respect to those cases where the large majority of taxes and contributions are closely tied to wages, causing high non-wage labour costs and thus damaging international competitiveness in comparison with low-wage economies.

But this objection is tenuous in a two ways. First, the problem of competition between high and low-wage economies only exists to a limited degree. This is because globalisation almost exclusively affects the rich, high-wage economies. The overwhelming share of the FDI-flow moves from high-wage economies into high-wage economies. Furthermore, at present firms are increasingly hesitant about, if not actually turning away from, investing into cheaper regions in the world. This is evidence of the serious locational disadvantages of low-wage countries. While they

can indeed offer cheap labour, they offer neither skilled workers nor sufficient and suitable non-monetary conditions for production. This is true for several former Soviet states and even more so for Africa. The high productivity rates in high-wage economies compensate by far for the high-wage and wage-related costs. Thus by comparing costs per unit – and that's exactly what counts – high-wage economies are thoroughly capable of competing. For instance, in Germany and Austria wage and non-wage labour costs are high, but within recent years their labour costs per unit have steadily decreased (*Sachverständigenrat* 1998/1999: 33), thus securing their international competitiveness. In contrast to the broad debate on Germany's international competitiveness, and despite the strong EURO, the German economy has experienced a steady growth in exports (*Sachverständigenrat* 2002/2003: 93). Year after year Germany appears as the 'world-champion' in exports.

All in all, globalisation has only little impact on the resources of national welfare states. But it certainly is possible that political misperceptions of the impact of globalisation lead to problems. But it is difficult to distinguish a case of this kind from the possibility that, by referring to the alleged coercions caused by globalisation, special interests are being pursued against the welfare states. With respect to the public perception of economic globalisation both cases result in the same end: They contribute to the construction of a contradiction between globalisation and the welfare state.

Ad 2. Is globalisation likely to cause additional social problems, which are the responsibility of the welfare state? The most expensive parts of modern welfare states, old age pensions and health security systems, develop almost independently of economic globalisation.[4] But globalisation has a direct impact on labour markets, hence affecting unemployment insurance systems. This consideration demonstrates the restricted realm of the possible consequences of globalisation for expenditures in the national welfare state.

Changes in export/import-relations and foreign direct investments are likely to trigger changes in the international division of labour, and these changes may in turn have an impact on national labour markets, contributing to the changes in the demand for labour. In addition, changes on the supply-side of the labour market could be caused by trans-national migration. Both effects are likely to cause additional unemployment.

At this stage of the discussion it is clear that the labour market is the link between globalisation and the welfare states. Globalisation's impact on the welfare states unfolds via the national labour markets [cf. Martin 1997]. It is primarily rapid changes in the international division of labour that could cause the demand for labour to shrink in the national labour market. But even if the level of total labour

[4] At least in Germany the liberal-conservative discourse directed against the welfare state has switched from globalisation to the ageing society as the main threat to the welfare state [cf. Walter 2003]. My assessment of this shift is that it represents implicit acknowledgement of the minor impact globalisation has on the European welfare states.

demand remains stable, globalisation could lead to irreversible losses of jobs in several branches.

This takes us back to the two crucial types of participants in globalisation-faiths: Short-term losers who are long-term winners, and short- and long-term losers.

Bridging and compensating

At least in the short run, participating in the globalisation process is the result of political decisions. The acceptance of such decisions crucially depends on the way in which the potential losers in globalisation and their political veto-power are dealt with. On the one hand, the welfare state can support the acceptability of participating in the globalisation process. On the other hand, however, globalisation does not support the stability of welfare states. This exactly is the globalisation-dilemma: Globalisation requires the backing of the welfare state, at the same time as it undermines it. But this dilemma is by no means unsolvable. Normally the negative impact of globalisation on the national welfare states is highly overestimated. Globalisation barely affects the welfare state's resources and its negative impact is concentrated in the area of social problems related to labour markets. In sum, the financial manoeuvring space is stable and the increase in the amount of socio-political problems is limited.

How can the problems be dealt with? For the two types of losers in globalisation – 'short-term losers who become long-term winners' and 'short-term and long-term losers' – I would introduce a distinction between two basic types of welfare state strategies.

1. Bridging: In this case the problem is maintaining labour power for re-entry into the labour market plus cultivating its qualifications.
2. Compensating: This means offering alternatives to the labour market. This could result in unrestricted access to social transfers, or access to income from capital, or both.

1. Bridging.

Among the losers in the globalisation process there are the many unemployed who can realistically expect future opportunities in the labour market. In these cases, socio-political measures aimed at helping to maintain an orientation towards the labour market and support the ability to work are appropriate. For the 'short-term losers but long-term winners' type, the adequate measures are social payments that at least fairly secure the status of income, support willingness to work and offer further training. In other words, social policy centred on wage labour is best suited to these types of problems.

2. Compensating

Those who are short- and long-term losers bear the brunt of the social costs of globalisation. If it is true that participating in globalisation generally causes gains in welfare, but parts of the population are excluded from direct access to these gains via the labour market, than other mechanisms are required in order to give them a share in the welfare gains. As I have tried to argue, this is not just a question of passionate regard, but could also turn out to be a precondition for the acceptance and thus for the feasibility of globalisation itself.

All forms of social policy centred on wage-labour, which keep people in a waiting position close to the labour market, are inappropriate for the short- and long-term losers in the globalisation. It makes no sense to force permanently excluded people to orient themselves towards dependent work. It is instead important to offer them alternatives to the labour market. Thus the questions about other income sources and about how to regulate them and how to further them become relevant. In modern societies, which are fully based on money, there clearly are a limited number of sources of income. Agriculture has lost its function as an autonomous source of income and as a possibility of retreat for the unemployed. Worldwide rapid urbanisation is destroying the basis for all sorts of income in kind. Three sources of income in cash remain: the labour market, capital and the welfare state. One might imagine various 'income mixes' [Vobruba 1998] comprised of these three types of income. Incomes from capital and from welfare-state payments can be seen as compensation for wage losses caused by globalisation. The idea of compensating the losers in globalisation via the welfare state relates to the basic income discussion and especially to the idea of a negative income tax. A negative income tax enables legal combinations of socio-political payments with other kinds of income. Political support for capital incomes as compensation relates to the idea of the 'share economy' [Meade 1986], which could be adopted into the discourse on globalisation. The underlying consideration is that the gains engendered by globalisation that emerge as profits should be distributed through enlarged participation in capital earnings, hence compensating for at least a portion of wage losses.

Some conclusions

I will limit myself to three remarks. The public discourse on globalisation increasingly focuses on the losers. Globalisation is dominantly seen as the main cause for rising inequalities between the first and the third world as well as within individual countries [cf. Wade 2003]. In Europe, the political construction of the relationship between globalisation and national welfare states has experienced a remarkable change. Years ago, globalisation was perceived as a material constraint and the cutting back of the welfare state as its unavoidable consequence. Be it pure economic ideology, or a political strategy of blame avoidance, or even true convictions, a neg-

ative nexus between globalisation and social security was established [cf. Watson and Hay 2003]. Globalisation is unavoidable – so forget the welfare state! Nowadays this nexus still persists, but its political impact has changed, as the public perception of globalisation as an economic constraint turns into an understanding of it as resulting from political decisions: If more globalisation means more inequality and less social security – then drop globalisation!

There are good reasons to assume that in the long run economic globalisation is likely to cause gains for (almost) all. At least there is strong historical evidence that the withdrawal of globalisation, as happened between the two world wars, is extremely costly [cf. Robertson 2003: 152ff.]. But notwithstanding this fact, in the short term, the dangers posed by globalisation dominate in the public attitudes against it. As relevant groups within society perceive economic globalisation as an existential treat, it is all the more likely that they will tend to try to hinder globalisation. Social policy plays a crucial role in partially absorbing those dangers, hence making the short-term horizon of people's interests and the longer-term horizon of globalisation compatible, and thus protecting globalisation by buffering it. In this perspective – and in contrast to the common wisdom – the European Social Model, with its built-in long-term perspective, turns out to be well equipped for coping with globalisation.

Globalisation and national welfare states – the core of the European Social Model – may be viewed as mutually supportive. Globalisation yields additional economic growth, hence compatibility with the welfare state must be a matter of distribution. And social policy paves the way for the public acceptance and thus for the success of globalisation under democratic roles. Consequently, by providing the national welfare states with enough financial resources globalisation secures its own sustainability.

But this relationship also has the potential to work the other way around: If relevant actors think that globalisation will destroy the welfare state, then indeed it has this impact. Welfare state retrenchment, publicly justified by globalisation, is likely to lead to resistance against globalisation, diminishing its economic potential, hence causing reasons for further cutting back on the welfare state. In this case globalisation really endangers the national welfare states. But then – as I have tried to demonstrate – globalisation becomes endangered, too.

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Religious Processes in Contemporary Czech Society*

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Abstract: Regardless of the role religion plays in the contemporary world, and the fact that there has occurred a massive de-privatisation of religions and de-secularisation of societies, in the Czech Republic the state of religion remains considerably understudied. This paper attempts to fill in this lack of knowledge. The subject is analysed with special regard to the values that are based on culture, symbolic representations and socio-economic institutions. Owing to the lack of empirical research, with the exception of some quantitative surveys and censuses, in this article the author works mainly with his own observations, which also incorporate historical arguments and analyses. He maintains that the developing trends in contemporary Czech religiosity are both similar to and distinct from those in Western Europe. The similar trends include out-of-church movements and even strong anti-clericalism, along with a process of de-traditionalisation and the rise of new spiritual outlets, connected either with 'New Age' spirituality or with the new charismatic and Pentecostal movements. The distinct trends involve a certain de-privatisation of traditional Christian beliefs, which is a reaction to the over-secularised suppression of the public sphere under the communist regime, and even before that. The paper reflects arguments that many of these processes, which have an important influence on Czech society as a whole, will undergo some changes with the state's entry into the European Union.
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Introduction

The role religions play in the public sphere around the world, affecting the socio-cultural space and politics, has greatly magnified in the last twenty or thirty years. As Samuel Huntington has pointed out, to a substantial extent religions define the cultural contexts of particular societies [Huntington 1997] in the world, which "is as furiously religious as it ever was, and in some places more so than ever" [Berger 1999: 2]. Thus, even in secular Western Europe, one can see the resurgence of the role of

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religion(s) in the public sphere, among opinion leaders, and in the constitution of personal value scales and symbolic universes. Soper and Fetzer, for example, argue that religions and their mutual bias remain important in politics in France, Germany and the United Kingdom to a degree that secularisation theory had not predicted [Soper and Fetzer 2002: 187]. Due to this 'religious backlash', the secularisation theory, once the core theory in the sociology of religion, has become quite outdated and many scholars have turned their attention to the new or renewed social roles religions play in the modern world. To be sure, in our times the sociology of religion and affiliated disciplines have experienced a great upsurge, although they have altered many of their a priori premises (for personal testimony on this, see e.g. Berger [1999: 2–4]). This seems to be an indisputable fact and one that can be observed all over the world – except in the Czech Republic, and possibly also in some other post-communist Eastern European countries, though certainly not all of them. Given that under the communist regime public religiosity was suppressed while violently atheistic propaganda was disseminated, organised religions have come to play only a small role in the post-communist countries today. This fact has usually been wrongly understood as signifying non-religiosity, and thus it has led to the virtual non-existence of the sociology of religion, which was also the result of other factors, including the legitimacy of the communist regime and inner problems of discipline.

Since the Velvet Revolution in 1989, a small number of Czech scholars have specialised in the sociology of religion, and these scholars have emphasised either the resurrection of new religious movements and church-state relations, or have focused on the historical and methodological dimensions of religion. Among the scholars in the former group are Tomáš Halík, Dušan Lužný, Milan Mrázek, Odilo I. Štampach and others, while the latter group includes, for example, Jan Horský and the author of this article. However, the two groups share an exclusively particularistic orientation. They only focus their attention on some kinds of 'exceptional cases' in the field of religion. The reason for this stems from the institutional lack of opportunities, the unfeasibility of conducting empirical surveys and broader research studies, and the negative approaches other scholars have adopted towards a subject as 'obscure' as the sociology of religion in their eyes appears to be. Interpretative sociology in this field has thus been reduced to explanations of quantitative statistical research, like censuses and some ready-made value surveys (ISSP, EVS), with little or no possibility of establishing a deeper understanding of the Czech religious scene and its internal development, and of unorganised forms of religion. Although some authors have pointed out that contemporary Czech religiosity is largely unaffiliated with church organisations [Hamplová 2000: 43; Nešpor 2003: 95], quantitative research has unfortunately, but understandably, been oriented mainly towards studying church membership, church attendance and some other 'official' indicators of religiosity. To this end many authors have used the only religious question (on self-professed affiliation with a church) that appears in censuses, deeper value surveys and, especially, in the *International Social Survey Programme* (ISSP), which in 1999 specialised in religion, or have used different combinations of these sources [Hamplová 2000; Lužný 1998; Lužný and Navrátilová 2001; Mišovič

2001: 110–185; Spousta 1999]. Contemporary formalised and organised forms of religions in the Czech lands would thus seem to have been studied enough. But as I pointed out above, this is certainly not the most important religious sphere to be studied. Experiences from Western Europe tell us that privatised belief structures, along with their implicit forms, now demand much more attention.

In this article I would like to introduce a somewhat broader view of religion. I would conceptualise it as a kind of symbolic universe, producing major and fundamental cultural values and norms, and for some people affecting almost every form of personal and social behaviour, including the behaviour in political and economic spheres. In other words, first, the spiritual and religious sphere – although not always and not explicitly for all to whom it pertains – generates the general 'value climate' of a society, and second, it greatly influences the behavioural norms and standards of certain social groups, which include more than just the members of churches alone. Although this is not the main subject of the article, an example of it can be seen in the recent accession of the Czech Republic to the European Union. Since EU accession refers not just to legal norms and methods of economic performance, but also to current habits of work and consumption, attitudes to individual responsibility, expectations of the nation(s), state(s) and other collective entities, and their symbolic legitimacy (though none of this has yet been 'unified' within the EU to date), the issue of the 'Europeanisation' of Czech faith(s) and religion(s) would appear to be important, and more so than just with regard to the imposition of institutional and legal rules and regulations.

Unfortunately, a study of this kind has virtually no tradition in contemporary Czech sociology of religion, and that is why there are almost no related empirical data sources of relevance. Given this fact, in my study I will combine different kinds of qualitative and quantitative data, both historical and contemporary, and multiple research methods to describe the situation. I will also use historical and comparative approaches, the reason for doing so being that religion is among the most 'stable' institutional spheres, at least to some degree. The contemporary situation of religion and its future development will be partly explained by looking at historical opportunities, challenges and changes. This is especially relevant, of course, in the case of the post-communist countries, where religious faiths were massively suppressed and/or influenced by the state and by the communist party's repressive powers. However, this historical dimension of research should not lead to any omission of contemporary and future religious development. From my point of view just the opposite is necessary. I will therefore try to describe certain important processes and tendencies developing in the Czech spiritual and religious scene and compare them with processes identified by Western colleagues in this field. Given the significant current lack of relevant Czech studies and data, it seems to me that the only possibility is to start with a broad form of research in the field of religion, spirituality and social and symbolic values, and that is what I would like to offer.

Are Czechs atheists? – A quantitative answer

Although, unlike some other communist states, the Czechs did not declare themselves to be an 'atheist nation' under the previous regime, the relative degree of religiosity was quite low in the country and fell rapidly during that time. On the contrary, the Catholic Church in particular and its Polish pope John Paul II (since 1978) drew attention to the Soviet block and tried to strengthen the resistance of members of this religious organisation to atheism and anti-Christian propaganda. For the Poles, for example, Catholicism thus became one of the most important social identities, negatively oriented against the 'others', i.e. the Soviet occupants, and an encouragement to leaders in society [Byrnes 2002: 27; Kepel 1991]. The Czech situation was never this unambiguous; nevertheless, there were high expectations with regard to certain changes in public religiosity after the eventual fall of the communist regime. Some of these were even fulfilled, as the canonisation of Agnes the Czech (1989) and the pope's visit to Czechoslovakia turned into nationwide manifestations of the strength of Czech Catholicism and Christianity. Some commentators thought that during the forty years of communism this faith had just been suppressed and in the early 1990s was again rising to the surface, while others interpreted the situation as a great value shift away from Marxism, which had functioned as secular or implicit religion, but which had recently shown itself incapable of replacing (resurgent) Christianity. It is not our purpose here to determine which explanation is more fitting (though in my opinion it is the second, and I would add that the phenomenon was also due to the minimal knowledge about Christianity among the population; see Nešpor [2003: 95]), but according to a 1991 census an increase in church-organised and church-affiliated religiosity became a fact in the late 1980s and early 1990s. In 1991 'only' 40% of the Czech population declared themselves atheists (or more precisely – belonging to no religious faith), while another 39% declared themselves to be Catholic, and 16% did not answer the question at all (see Table 1). Ten years later, however, the situation was quite different. There was no 'religious resurrection', and membership in nationwide Christian churches, both Catholic and Protestant,[1] fell rapidly.

If what the censuses tell us is true, then the religiosity of the Czech population rapidly declined in the 1990s. The number of atheists grew and the number of

[1] As elsewhere, Czech Protestants are also divided into a variety of churches, which differ significantly in their teachings and size; the largest is *Českobratrská církev evangelická* (Protestant Church of the Czech Brethren), overwhelmingly Calvinistic (though it officially uses four Protestant confessions, Augustana, the Second Helvetian Confession, Czech Confession and the confession of Czech Brothers). *Církev československá husitská* (Czechoslovak Hussite Church), which was established in 1920 through a secession of some Catholic clergy, has recently also become more Protestant-like (in 1994 it signed Leuenberg Concordiae). For the purposes of the census the Greco-Catholic church (a Uniate section of the Catholic Church) is calculated separately, but its membership is so small that it makes no significant difference.

Table 1. Inhabitants of the Czech Republic according to religion, 1991 and 2001

Church	1991	1991 (%)	2001	2001 (%)
Roman Catholic Church	4021385	39.0	2740780	26.8
Greco-Catholic Church	7030	0.1	7675	0.1
Orthodox Church	19354	0.2	22968	0.2
Protestant Church of the Czech Brethren	203996	2.0	117212	1.1
Czechoslovak Hussite Church	178036	1.7	99103	1.0
Silesian Lutheran Church	33130	0.3	14020	0.1
Jehovah's Witnesses	14574	0.2	23162	0.2
Adventists	7674	0.1	9757	0.1
Other churches	23899	0.2	4277	2.5
No answer	1665617	16.2	106673	8.8
Atheists	4112864	39.9	6039991	59.0
Total	10302215	100	10230060	100

Sources: *Náboženské vyznání* 1995; *Sčítání lidu* 2003.

people who did not answer the question became less significant. Among the few religious organisations profiting from this development were small churches, usually of a sectarian kind of faith or of a specific traditionalism, used as a way of interpreting Christian Scripture. The Jehovah's Witnesses increased membership by 60%, the Apostolic Church grew to be threefold in size, and the Church of the Brethren (the Free Reformed Church) even became three and a half times larger; on the other hand, with the exception of the Jehovah's Witnesses, all these churches comprise less than 0.1% of the population. The same seems to be true for membership in the Pentecostal movement and the new religious movements (NRMs), especially those of oriental origin, which have influenced a certain proportion of the population but not significantly enough to warrant quantitative research.

The fall in the number of Czechs affiliated with a church during the 1990s has several explanations, which include the deaths of elderly people with religious faith, better general informedness about churches, the relations of churches to the state (especially the unsolved case of property restitution[2]), and their political and civic

[2] A large part of the property of churches, especially that of the Catholic Church, which was among the major landowners in the state, was secularised after the communist take-over in 1948, in many cases illegally. In the 1990s the state returned a (small) part of this property to the Catholic Church, forced by different restitution laws, while the situation regarding the rest has remained unsolved.

activities in the democratic society. Eva Morawska argues that, even in Catholic Poland, while the agenda of the Catholic Church has remained basically consistent over the years, the public response to the church has been fundamentally inconsistent, and the church has become widely suspected of being inappropriately 'sectarian' and anti-democratic [Morawska 1995]. The same is true, of course, in the agnostic Czech Republic; the Catholic Church was unable to profit from its popularity in the early 1990s and consequently lost it. As D. Lužný has pointed out, its desire for the restitution of (all) its property has played a role in this process [Lužný 1998: 216], as have the unaddressed 'historical sins' of the church, including the collaboration of some priests with the communist regime and the unwillingness of the church to face former dissidents and persecuted persons over this issue [Grajewski 2002: 33–89]. All of these explanations seem to be relevant to a certain degree, even though they are not wholly true. Despite the higher degree of religious self-declaration in 1991 than in 2001, attendance at religious services, worship and other rituals was low throughout the 1990s, and it was only higher among the older population [Hamplová 2000: 42–43; Lužný and Navrátilová 2001: 90]. In short, the relatively high number of 'believers' in the 1990 census was both the result of a popular 'mistake' and a result of their unawareness about what Christianity (and especially Catholicism – for many synonymous with Christianity) really means. However, this outcome does not mean that the majority of Czechs are, as Max Weber would put it, 'religiously unmusical'. According to Hamplová, "the dispassionate approach to traditional [= popular] churches and Christianity doesn't mean that Czechs refuse the existence of supernatural as a whole"; it results in their man-centred beliefs in 'fatalism' and 'occultism' [Hamplová 2000: 43–48].

To conclude, for Czechs, privatised forms of religion are important in the search for spirituality; what Grace Davie refers to as "believing with no belonging" [Davie 1999], many times even accompanied by strong anti-church feelings, overwhelmingly prevails. It even results in people declaring themselves non-believers, even though they simply mean that they are not church members. But there is nothing new about these characteristics of contemporary Czech society. Bohemia has traditionally been one of the most 'secularised' countries in the world, not just today but even one hundred years ago. To understand the contemporary situation, we have to turn our attention to certain changes that occurred a long time ago.

The historical roots of Czech anti-clericalism

Many Catholic scholars and even some European historians have shared the belief that the roots of Czech anticlericalism reached as far back in history as the Hussite movement in the 15th century [e.g. Rémond 1998: 278]. According to them, no positive promotion of religion is possible in the Czech Republic, as Czechs have always been primarily an anti-religious and anti-clerical nation. However, such an explanation oversimplifies the facts; it pays little attention to Czech religious development after the Battle of White Mountain (1621) and following the relative success of the

enforced Counter-Reformation and the spread of baroque Catholicism. After the Counter-Reformation, over the course of the 17th century, Catholicism became the personal faith of the great majority of Czechs. The Hussite movement, however, led to some problems with this Catholicism.

We could find in the Czech lands in the 18th century a few secret non-Catholic groups whose religious faith was not completely clear. They were, however, certain in their anti-Catholicism and in their closeness to the Lutheranism of that period, i.e. the Pietistic movement. Because of their existence, and in keeping with the principles of Enlightenment, the Emperor Josef II eventually issued the Tolerance Patent, allowing the existence of Protestantism in Bohemia and Moravia (1781). Among the other of his well known religious reforms there were also the great changes he introduced to Catholicism, which, as he referred to it, needed to be 'modernised' and especially 'enlightened'; all the 'superstitions' and 'magical practices' of the baroque era, such as pilgrimages that mushroomed to excessive forms, monastic orders, religious brotherhoods, devotional practices and other such conduct, had to be condemned in the process of the rationalisation of faith. Enlightened piety was thus just the antithesis of the piety of the baroque era; it left no space for the formerly held belief in the supernatural and at the same time was a deeply individual, mystical and 'orthopractical' way of serving God. Equally, however, like all other enlightenment reforms, this one too was made from 'above', with no respect for the will of the people, or for their cognitive abilities. This fact, in conjunction with the religious propaganda put out by the newly allowed Protestant churches, resulted in a massive weakening of religious authority. M. Hroch has recently argued that this development, along with other external reasons – mainly the Napoleonic wars, the end of Holy Roman Empire and the bankruptcy of the Hapsburg state (1811) – led to serious crisis of identity, which destroyed the primacy of religious identity that existed in the *ancien régime* and led to national mobilisation and to the constitution of the modern Czech national movement [Hroch 2003].

This explanation tells us why Czech intellectuals, and later Czechs as a whole, became 19th-century nationalists, but it does not tell us much about the loss of their religiosity during those times. Here we will fill in this gap and provide some reasons. Czech nationalism was built specifically on historical pillars. It legitimised itself by looking back on the historical magnificence of the Czech medieval state and its legal, social and religious institutions. What became evident is that the above-mentioned institutions were not Catholic but mainly Hussite. While in the 19th century the Czechs felt themselves to be an independent and formerly great nation, they at the same time found out that this national greatness was not connected with the Catholic faith of their own times but with Hussite (or semi-Protestant) faith of their predecessors.[3] J. Rak has pointed out that Hussitism thus came to be painted

[3] This self-identification, which had led to the shift from religious to national, 'realistic' and 'humanistic' identities (T. G. Masaryk), and even class identities, was further strengthened later in the 19th century and at the beginning of the 20th century. Masaryk and some other

in much brighter colours [Rak 1979: 103–105], which led to the even deeper devastation of Czech Catholicism and to the Catholic clergy (usually of Austrian origin) being accused of anti-Czechism. As a result the Catholic Church became the 'usurper' in the eyes of the people, although no significant pro-Protestant movement appeared. 'Pro-forma Catholicism' (or in Masaryk's words, 'Catholicism of birth-registers' or the *'böhmisch-katholish'* faith), with its liberal world-view and no religious participation, became more common.

Since the 19th century the Czech nation has become strongly secularised. Over time it distanced itself from the Catholic faith, which was found to be 'too medieval', but not for the sake of any other religious confession. All religions were deemed 'too sectarian' and restrictive on individuality in terms of teachings and religious social practices. Thus, neither the union between the Czech Calvinists and Lutherans, which established the Protestant Church of Czech Brethren (1918), nor the founding somewhat later of the Czechoslovak (Hussite) Church drew much attention, unlike the *Los von Rome* movement that had occurred somewhat earlier in Germany and had there led to an inclination towards Protestantism. In its function as a personal symbolic universe, religious identity was replaced by national identity and later by class identity, as well as by a scientific world-view. Czechs as a result became atheists, liberals, nationalists, and even socialists in the 19th century, and at the same time religion ceased to play any role for them, except for its role as a relic of 'folklore'. It became the 'reflection of medievalism'. Clearly this development was only strengthened by the European secularisation in the following century. The First Republic (1918–38) tried to follow the pattern of the church-state relationship in France, though not always successfully. Later on, communist rule only furthered existing anti-religious tendencies. Czech society thus became the perfect example of European secularisation, functioning as a self-fulfilling prophecy; its eventual victory can be explained in the words of J. Casanova, "better in terms of the triumph of the knowledge regime of secularism, than in terms of structural processes of socio-economic development such as urbanization, education, rationalization, etc." [Casanova 2003].

What is important, and what we must keep in mind, however, is the fact that this 'anti-religiosity' does not mean a lack of religious or quasi-religious personal spiritual needs and expressions. Czechs have long been suspicious about church-organised religion, but not about the 'neo-Durkheimian' forms of religiosity, transferring piety to ethnic, class or state entities [Taylor 2002: 78], and not about privatised religious matters. My recent research has shown that even in the period of communism many people searched for religion-like symbolic universes, which they found, for example, in what was expressed by so-called protest songs [Nešpor 2003].

intellectuals (L. Kunte, R. Máša, some of the so-called Catholic modernists) tried to establish a new religion, or initiated a certain revival of 'pure' Christianity [see Horyna and Pavlincová 1999: 197–223], while others actually succeeded in doing so (the founding fathers of *Církev československá*/Czechoslovak Church). The process of identity shifts is to be thoroughly investigated in a forthcoming study by the author [Nešpor 2004].

Similarly, as one observer has pointed out, in the case of Czech "religious scepticism ... one cannot speak directly of atheism; this would assume a denial of everything that transcends usual sense perception. The intelligent Czech seems to be far away from this, he leaves himself enough space for his engrossment in transcendence. Still, what results from this engrossment is that he is usually unwilling to place himself within a church framework, which is subordinate to some higher authority" [Frýbort 2000: 16].

Privatised religiosity and spirituality as a solution

This Czech anticlericalism of historical origin nowadays influences both social forms of faith and matters of people's personal faith (world-views) in the form of privatised religiosity, and has been strengthened by the Western European shift away from religion to spirituality, in which "the religious (for God) is giving way to the spiritual (for life)" [Heelas 2002: 358]. Many people are therefore 'in the middle ground'; they do not consider themselves to be members of any church or involved in any kind of traditional religion. They do not even identify themselves with agnostics or atheists. Spirituality, as they understand it, both theistic and man-centred, is usually constructed in terms of the metaphor of a quest, a personal 'journey' implying not only an anticipated destination or goal but also a sustained effort extending over a long time. The goal seems to be even less important than the quest itself. It includes 'spiritual searching', i.e. 'shopping in the spiritual (super)market', with the possibility of experiencing great and sudden changes, and strong personal opinions about transcendence (or its non-existence) and its transformations, in the form of the pro-life activities provided by religion. The dispersion and plurality of personal spiritual needs and attitudes could be another source whereby the functioning of the spiritual market has been strengthened.

It would seem that privatised religion (or spirituality) was the solution to Czech anticlericalism, which in itself does not suggest the existence of anti-transcendental attitudes, at least not in our times. This fact is demonstrated in the religious faith of members of established churches who are not dogmatic about observing church orthodoxy. Drawing on the findings from the Czech part of the ISSP survey, D. Hamplová pointed out that "faith in Christian teaching in the society is significantly less than the portion of [Christian] believers ... e.g. only one quarter of Catholics believed that God is a person ... Traditional Christian teaching was practised only by one fifth of people, while only 4% of Catholics can be described as 'pure Christians'" [Hamplová 2000: 47]. With the exception of how many there are of them, there is nothing special about Czechs 'believing without belonging' in the Western European context, given that similar surveys provide quite similar results in other countries, too [see e.g. Davie 1999: 70, tab. 2]. However, one special feature could be the fact that the range faith indicated above has nearly no connection to social grouping (except for small, sectarian religious groups). Thus, a great number of Catholics and Protestants declare themselves believers, and some of them even at-

tend worship and other church sessions – but they mainly think what they want. Even though more sophisticated factor analyses of the surveys are not available, it is nonetheless clear that a large number of people (including formal Christians) believe in some kind of 'mystical' or 'occult' powers and subjects: 49.7% of the population, for example, believe in the power of amulets, 50% believe in horoscopes and 69.6% even believe in predictions made by fortune tellers [Hamplová 2000: 45, tab. 20; see also Lužný and Navrátilová 2001: 91–94]. In addition, these kinds of privatised 'mystical' beliefs are more common among the young, well-educated population, so they seems to form a kind of trend in Czech religiosity, which will become stronger in the future. Once again – there is nothing special about it in the broader Western European context, except for the extent of it, and probably also for the deeper historical roots that influence the situation of faith in the Czech lands.

One might ask about the social, political and cultural results the situation leads to. Even if privatised religion *ex definitione* does not take the form of any specific social group, it certainly does influence people's perception of (Christian) churches, church-state relations, and cultural values, norms and habits in terms of their behaviour, thoughts and emotionality. Let me begin with its influence on perception. This can clearly be seen in the impact of business relations on the religious sphere. The conceptualisation of a 'spiritual market' and consumerism, taken from T. Luckmann's hypothesis of the invisible religion [Luckmann 1974: 99–102] would thus seem to be more than just a mere metaphor. Both religious organisations and purely commercial organisations have found people's spiritual needs to be worthy of their business and valuable enough to re-orientate their supply. Christian missions have changed into exercises in public relations to take in a wide range of consumers, like the Catholic advertising campaign promoting the traditionalism of Czech Catholicism run during the last census, and church life has transformed to encompass lobbyism in Parliament and fundraising among different state and private agencies. All of these practices seem to be important and will be discussed below. But even more important are the (profane) business activities that focus on meeting the spiritual demands of the individual.

Since 1989 the Czech Republic, like the Western European countries some years ago [Heelas and Woodhead 2001: 363–366] has been flooded with 'spiritual' shops, magazines, literature and music. 'Secret' and/or 'spiritual' histories (of anything) have ranked among bestseller books, not only in special spiritual shops, but also in supermarkets, while virtually every popular magazine or radio has adopted an astrological and/or 'therapeutic' section. Psychological and alternative-medicinal therapies for 'sick souls' and 'yogic' massages have also become widely known and used at least by a certain proportion of the population, whilst homeopaths, for example, have even been allowed to become members of the Association of Czech Physicians. As usual, the prices of such goods and services are quite high, definitely higher than what they are worth, but they are selling well. Just as in Western Europe, the spiritual market in the Czech Republic works well and probably embraces, at least to some degree, the social majority. The 'spiritual revolution' has thus become

a mainstream movement, even though, unlike in some other countries, these 'spiritual goods' are not usually connected with any kind of Christian legacy (including the de-traditionalised one). In this process of the 'disneyation' (A. Bryman) of supply it is possible to observe strong demand structures in the religious market, including thematicity, consumer equalising, advertising, and an artificial call for cheap sentimentality. But contrary to the situation in North America, these shifts are not primarily connected with Christian churches or interest groups. They are mainly the responses of business firms that have discovered the demand side of the market and have tried to fill it with their products. In these times of strong individualism, materialism and consumerism in contemporary Czech society, a characterisation demonstrated in other pieces of research [Nešpor 2002: 74–79], such an orientation appears self-fulfilling; the more expensive and more 'marketable' spiritual goods are, the better they are imagined to be and – of course – the better they sell. The Czech population is thus one of the best examples of the rule 'I am what I buy', which had led to consumerism establishing itself as the 'new religion' for thousands.

Outlets of religious de-privatisation

Although Czech society ranks among the most secularised societies in the world (the Bohemian population to a higher degree than the Moravian one), and although it has witnessed many varieties of privatised religiosity, a certain kind of religious de-privatisation managed to emerge in the 1990s. This is mainly a result of the fact that religion had been suppressed so much under communism and thus a certain religious comeback and de-secularisation of politics inevitably had to occur. However, these shifts are also been supported by the worldwide de-privatisation of faith and especially by the modern Catholic upsurge under Pope John Paul II (in the early 1990s it was also made stronger, as mentioned above, by the Catholics' contribution to the democratising process). Religion, and especially Roman Catholicism thus returned to politics, as in other Eastern European countries, and took part in policy making and parliamentary and governing coalitions. While it should not be considered 'too powerful', it is still 'highly visible' and influential in certain fields, like in attitudes towards the family (and in family legislation, including laws on abortion, sexual behaviour and so on), education, drug policy or relations to other, mainly non-Christian and 'sectarian' faiths. Although D. Lužný believes that there is relatively no religious de-privatisation in Czech society [Lužný 1998: 223–224], this is only true in comparison with some countries in the developing world (and the United States to some degree), which have witnessed a massive outbreak of religious de-privatisation. From any other point of view, the Czech Republic is undergoing a widespread and strong, albeit 'invisible', process of 'religionising' policy and the public space. Of course, mainly, and sometimes only traditional (Christian) churches and interest groups of that origin are involved in this process.

Among the most important changes has been the re-constitution of the Czechoslovak People's Party (*Československá strana lidová*) into the German-like Christian

Democratic Union (*KDU-ČSL*). Whilst the party was founded in the late 19th century as a political group of some (usually modernist and socially engaged) Catholics, today it has transformed itself into a party for all Christians. It facilitated the entry of some Protestant public leaders into Parliament, receives the electoral support of both Catholics and Protestants (and of some 'spiritual' opponents of pure materialism, individualism and the neo-classical economic mainstream). The party's policy, however, is still much closer to Catholicism. Its ecumenism though means that it is capable of integrating all Christian voters and those who sympathise with traditional and conservative values, like pro-family policy, the criminalisation of abortion, banning legal partnerships between homosexuals and strong anti-drug legislation, etc. Among the party's most important achievements is its successful introduction of the new family legislation in 1998. In the name of a pro-family and pro-child policy, the new family law has made it much more difficult to obtain a divorce.[4] The architects of this policy would like to go even further, like their counterparts worldwide [Casanova 1994: 211–234]. They abandoned (three) clashes with the left over the legalisation of homosexual partnership and, as in Poland [see Byrnes 2002: 38–39], they have tried to introduce less liberal abortion rules, despite the fact that the number of legal abortions dropped during the 1990s. KDU-ČSL has also tried to impose other restrictions that would allow abortions only in cases of rape, fatal deformity or serious threats to a woman's life. It seems that there are many well-wishers behind this kind of policy owing to the negative demographical development in contemporary Czech society and some people's xenophobic fear of immigration. The same applies in the case of drug legislation and the party's 'strong attitudes' about this issue. KDU-ČSL leaders would not allow the legislative distinction that divides drugs into two groups, 'soft' and 'hard' drugs, because they think that all drugs are a serious danger to human health (and, of course, it drives users away from the path of God).

While in many other political matters the Christian party behaves just as any political player with no core 'ideological' policy, in matters related to Christian and especially Catholic faith it visualises itself as the defender of 'real-Christian' and traditional norms and values, which are presented as the only medicine for saving society. This de-privatisation of religion (thanks mainly to the traditionally Christian voters in Southern Moravia and to a lesser degree also voters in Southern Bohemia, and last but not least to some Prague intellectuals) has evoked different reactions. It is strongly opposed by the liberally oriented modernists, believing (only) in economic growth, and the (usually aged) communists, who recall the 'golden age' of social security and ideological certainty. Both these groups, which represent the majority

[4] Real social development has not however been so straightforward. Nevertheless, the number of divorces dropped right after the law was introduced (due both to the necessity of reopening all divorce trials under way and to the stricter rules imposed, for example with regard to the period of estrangement between partners), later the number reverted to the previous level and then even grown. This is a result of the fact the law's stipulations are largely by-passed.

of Czech voters, thus reject Christian policy as something 'medieval', old-fashioned and contrary to modernity, which implies the prosperity of humankind. However, these opponents in fact assist KDU-ČSL, at least to some degree, as such discussions provoke a wide reaction in the mass media and bring new 'traditional' voters to the party. While in the early 1990s the voting preferences for KDU-ČSL were dragged down by scandals and the party's strong support for the property restitution of the Catholic Church's real estate, the subsequent sundering of any direct connection to the church has changed this completely. The issue of restitution is as yet unsolved, just as the concordat with the Vatican remains unsigned, but both issues are by many considered more likely to be problems of the church, not of the Christian party. Thus these unsolved issues did not arouse strong criticism of the party, which presents itself more as being Christian as a whole[5] than as being particularly Catholic.

The church itself is not really engaged in the policy of KDU-ČSL (though it used to be in the early 1990s), owing to the complexity of some cases and different interests. This separation resulted in many quite rational, bureaucratic and utilitarian politicians and intellectuals identified with the Catholic or Christian 'legacy' (as they – not the church – understand it) moving into a leading position in the political scene. In addition to the continual spread of Christian or Christian-like writers, essayists, media figures and broadcasters, special mention should made of the serious thought given to the particular presidential candidates to replace Václav Havel as Czech president following his retirement in 2003. Owing to Havel's legacy as a moralist president, and to a number of other, mainly historical reasons, people in the Czech Republic usually imagine a non-party personality with a strong moral background in the presidential post. During the presidential elections in 2003 it was the former prime minister, the neo-classical economist and EU-opponent Václav Klaus, who won, but some other figures with a strong affiliation with Christianity – like the Catholic priest and thinker Tomáš Halík, or the Catholic philosopher Jan Sokol – were players in the game, too, at least in the eyes of some well educated, urban intellectuals. Although in the end they did not win (and Halík was not even nominated),[6] the mere possibility of their victory in a prevailingly atheist state would seem to be significant.

In spite of the interest of the majority of people in policy-making and in religious de-privatisation in this sphere, mention should also be made of similar,

[5] This 'traditional' and 'Christian' policy also means strong opposition to new religions, both NRMs and 'foreign' religions (like Islam). Among such examples, one could mention the Czech Muslims, which form a true minority, but who were not allowed to build their only mosque with minaret in Brno due to the fact that a 'too visible' minaret would offend Christians. Mention should also be made of the new legislation concerning churches and religious groups (since 2002), because it highly favours the established churches. On this issue see especially Štampach [2000].

[6] The Czech president is elected by Parliament, though there is a strong popular movement which favours the direct vote by the people. If there were, the new president would probably be found among non-partisan 'moral' thinkers.

though less visible shifts in other public spheres. In the 1990s Czech society witnessed the (re)birth of the religiously governed services of medical care, social work, education, mass media and the service of priests in prisons and the army. While some of these changes led to discontent among the majority of the population and even criticism, centred especially on those institutions with the broadest social impact (schools, media), another possible result is that the majority believe that "the existence of churches ... [is] necessary or useful only for the care of old and sick people" [Lužný and Navrátilová 2001: 95]. Traditional churches are thus (at least) allowed to do what nobody wants to do; in this way even anti-clerical people grant them their 'existential rights' (though certainly not outside the range of activities indicated here), but there is a possibility that the scope of activities tolerated could expand in the future. If this happens – and it seems highly likely it will – then the Christian churches will slowly but surely re-institutionalise their presence in the social and cultural spheres. Consequently, they (or the organisations connected with them) will, through their work in such spheres, at least partially de-secularise society and impose new spiritual outlets, such as the hospice movement of our day. It is not clear, however, whether these shifts would lead to a move towards Christianity as such, or if they would strengthen some kind of 'amorphous' privatised religiosity, which seems more probable.

Other trends in the religious development of contemporary Czech society

Recent worldwide trends in religious development, which have been studied by scholars in religion, also include the upsurge of Pentecostalism and the charismatic movement, and other theological, and especially devotional changes to traditional, church-organised Christianity. Although the impact of these shifts is not yet of any great importance in the Czech Republic, it seems to have a certain influence, especially among the young population.

My analysis of this movement draws on the findings of P. Heelas regarding the modern religiosity that is oriented towards life, which includes both theistic movements, centred around the Holy Spirit, and privatised spiritualities focusing on the higher self [Heelas 2002: 370–372]. If we start with Catholic youth, we can see that their personal piety seems usually to be oriented towards quite 'modern' and less orthodox spiritual movements, such as private (Marian) revelations, viewing the pope as a 'cultural hero', and towards a celebration of 'exemplary persons', personal gurus, who are usually young, modern and charismatic priests or friars. These believers go through a deep inner struggle to reach their spiritual orientation, though much depends on their teachers, who are not always fully orthodox in their teachings, and yet in many cases they use the membership in a church only as a 'spiritual label'. They are much less concerned with the church's dogma than with the behavioural implications of the faith in politics and especially in private life, including the forbiddance of pre-marital sexual relationships or the use of contraceptive devices. In fact, many of them hold the unorthodox belief in reincarnation and simi-

lar phenomena, while their faith in a personal God as Saviour and especially in other 'old-fashioned' points, like Heaven and Hell, seems to be less important. Similarly, among the Protestants there is a relatively wide youth movement in Pentecostalism. It provides a personal connection with the Holy Spirit, while omitting Bible study and traditional church teachings (and authority). This quest for mysticism is also usually associated with charismatic leaders, who in some cases direct their followers away from the established churches [e.g. *Církev* 2002: 11, 258].

The turn to Pentecostalism and charismatic Christianity among young members of these churches can be interpreted as a 'mild' rebellion against parental, church or any and all kinds of authority and can be connected with the search for spirituality or 'shopping' in a world of new uncertainty. At the same time the faith of these young people is strengthened by the moral failure of the majority of other churches as a result of their formerly pro-communist behaviour. Although all these explanations appear to be true they are nonetheless insufficient. In addition, such 'protest movements' among young members of churches are closely connected with shopping for spirituality in general, which also includes other, new non-church spiritual outlets, like the NRMs, 'oriental' philosophies,[7] therapeutic practices, literature and music, and many other examples. These form secondary (spiritual) institutions, offering 'home after home' as substitute structures, similar to those Heelas found in Western Europe [Heelas and Woodhead 2001: 59–68]. The leaders and members of such institutions are thus fighting on two fronts. On the one hand, they disagree with the 'traditional' social and political role of religion. This means they both resent and cry out against the old Moravian Catholic churchmen (for having re-established traditional society), who are usually associated with anti-enlightenment rhetoric, generally condemning the former Emperor Joseph II, and with the contemporary political de-privatisation of (Christian) religion. On the other hand, they are waging a battle against what could become the full privatisation of spirituality. This privatisation goes hand in hand with rising uncertainty in a changing world and can also be linked to the (more generally) prevailing processes of individualisation, materialisation and 'economisation' under way in Czech society after 1989. The neo-liberal policy and neo-classical paradigm in socio-economic relations backed by Václav Klaus, which only served to strengthen even further the communist-era individualistic and materialistic social maxim – 'he who does not steal, robs his family' – are, from this point of view, condemned for having led to exclusively private and material concerns, and consequently they are forsaken. The same applies to consumerism, mainly material consumerism, even though its critics do not realise that they themselves are also 'shoppers' – in quite a developed spiritual market.

[7] As in the other countries, this 'orientalism' is in fact implicitly connected with many Western, a priori mental habits and prejudices. At the same time, it is deeply affected by *neovedanta*'s interpretation of Indian heritage.

Conclusion: Czech religiosity moving into the European Union

The trends that are developing in contemporary Czech religiosity are both similar to those in Western Europe and distinct from them, depending on the specific historical and socio-cultural circumstances of Czech society. The similarities include out-of-church movements and even anti-clericalism, de-traditionalisation and the rise of new spiritual outlets that are connected either with 'New Age' spirituality, or, to a lesser degree, with the new Charismatic or Pentecostal movement. The distinctive trends involve a certain de-privatisation of religion in the case of some faiths mainly affiliated though not directly connected with traditional Christian churches, while these in turn are returning to politics and to the public sphere after their overly secularised suppression under the communist regime. The Czech spiritual scene is thus transforming to an even higher degree than society as a whole is, but with uncertain and barely visible outlets and goals. The continued privatisation and pluralisation of beliefs is combined with the de-privatisation of traditional religions, and at the same time with the rise of de-traditionalised secondary spiritual institutions. Obviously, only the future can tell who the winners and winning strategies will be with regard to both religious organisations and the men and women looking for a spiritual dimension in their lives.

Whilst the description of different and, in many cases, counteractive developmental trends in the sphere of Czech religiosity and spirituality may be sufficient for understanding the contemporary situation, it will definitely not suffice for understanding the near future. This is owing to the fact that Czech religiosity (and anti-religiosity) has been massively influenced by foreign sources, at least over the past fifteen years, and therefore it will probably be even more affected by these influences as a member of the EU. The most visible changes will occur in relations among political entities and in political rhetoric. The Christian party and its politics will certainly co-operate with its Western colleagues and with those from the Visegrad countries. While the orientation of the Czech policy towards the West has been in fact present for a longer time, the second orientation mentioned has not. The reason for this no happening is certainly not a matter of any animosity between Czech and Polish (or other Eastern European) Christian policy makers. Rather, it is due to the fact that the Czech population feels itself somehow to be 'better' and 'more Western' than the other Visegrad countries. That is why the co-operation it has maintained with the East has up until now been insufficient and marginal. It seems that this will soon change, now that the Visegrad countries have entered the EU. However, there are also anti-religionists inclining toward the 'modernised' and 'most developed' West. They argue that the enterprises of Western societies and economies are connected with secularisation and privatisation, if not even with the abandonment of religion. European integration and policy making in the enlarged European Union (and in other related social, economic and cultural practices, though probably to a lesser degree) will thus lead to a sharpening of existing religious cleavages in the Czech political and public scene. While unlike in Poland [see Casanova 2003] there has been no Czech 'Europhobic' movement connected with

Christian attitudes (fearful of the loss of Christian identity in a secular, materialistic and hedonistic Europe), or with the direct opposite attitudes (fearful of the size of some Christian political parties in the EU), the importance of these issues will probably emerge now that the Czech Republic is a member state.[8]

No matter how visible the political side of the religious influence on the public becomes, it will by no means be the only effect on the field of religion resulting from the Czech Republic's integration into the EU. It may also be expected that there will be a much greater reciprocal support among the secondary spiritual institutions, their 'Europeanisation' and much closer connection with similar Western institutions. The supply of commercialised forms of 'sacrum' and marketable spiritualities will increase greatly, too, as will the new spiritualities of life, reinforced by the Western patterns they grew out of and/or their 'founding fathers'. Whether this will lead to diminishing Czech individualism, materialism and other negative aspects of contemporary 'wild capitalism',[9] which reduces the role of men and women to that of passive elements living in economic or economic-like playgrounds, to the advantage of some churches or secondary institutions (including economic ones; see Heelas and Woodhead [2001: 59–62]), or even in favour of a more collectivistic 'civic religion', remains an unsolvable question. The opposite seems equally possible.

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[8] Regardless of the wider and more important processes of 'Europeanisation' one can expect that the above-mentioned issue of the legalisation of the so-called new religious movements, both sects and cults, will be widely affected by convergent European rules, regulations and even popular opinions. It seems highly probable it will be massively discussed among the policy makers and in the mass media, as it has been in some EU countries (notably in Austria, France and Germany; see Introvigne [2000] and Richardson and Introvigne [2001]), while public attitudes and restrictive regulations against them will probably harden.

[9] However, this materialism and individualism can be seen not only as the result of the general neo-classical course and some mistakes of the Czech transformation after 1989. It is also connected, at least to some degree, and strengthened by the contemporary 'corrosion of character' in the developed countries [Sennett 1998].

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HUMAN RESOURCES

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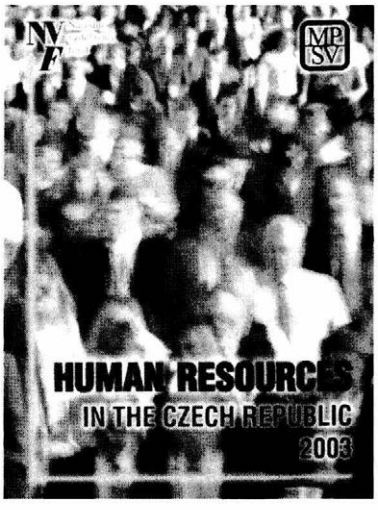

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SHARING EXPERTISE IN TRAINING

Has the Post-communist Transformation Led to an Increase in Educational Homogamy in the Czech Republic after 1989?*

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Abstract: This article analyses trends in educational homogamy in Czech society from 1988 to 2000. Two hypotheses are tested: (1) that educational homogamy strengthened as a result of growing economic uncertainty during the 1990s, and (2) that educational homogamy is higher among younger newlyweds than among people who get married after 30 years of age. The authors analyse vital statistics data on all new marriages for the years 1988, 1991, 1993, 1997 and 2000. Using a log-linear analysis the first hypothesis was refuted, as no change in the tendency towards homogamous marriages was observed during the 1990s in the Czech Republic. Stronger support was found for the second hypothesis, as educational homogamy is indeed much higher among younger than older couples. Finally, the article includes a discussion of some possible explanations for the absence of a trend towards homogamy that was detected.
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Introduction

Most people think of their choice of spouse as a decision dictated by romantic love and mutual attraction. Partner preferences, however, follow predictable empirical patterns at the societal level. Sociologists have discovered that people tend to marry partners who are similar to them with respect to family background, age, education, social class, race and religion. The preference for a partner with similar characteristics is far more common than would be expected in purely random pairing [see e.g. Ultee and Luijkx 1990; Kalmijn 1991a, 1991b; Mare 1991; Smits, Lammers and Ultee 1998a, 1998b, 2000; Raymo and Xie 2000; Schwartz and Mare 2003].

While in the first part of the 20th century sociology discovered the rule of marital homogamy and identified the factors that structure it [see e.g. Hunt 1940; Burgess and Wallin 1943; Winch 1958; Girard 1964], towards the end of the 20th century social scientists were concentrating on measuring homogamy and studying its inter-generational and spatial variability. In research studies on stratification, comparative analyses of homogamy inform comparative analyses of social mobility, and vice versa, because, like social mobility, homogamy reflects the social barriers among social strata and social groups [Ultee and Luijkx 1994; Smits, Lammers and Ultee 1998a, 1998b].

Homogamy has recently become one of the most frequently researched stratification topics [Hout and DiPrete 2003]. Many authors have been inspired by the study of intergenerational occupational mobility conducted by Erikson and Goldthorpe [1992], and strive to identify trends in the development of homogamy. Some authors have reached the conclusion that patterns of assortative mating, and especially the extent of homogamy, change over time [compare Smits, Lammers and Ultee 1998a, 1998b, 2000; Raymo and Xie 2000]. However, a number of studies have arrived at the opposite conclusion, and the research community has not yet produced any satisfactory generalised conclusion [Hout and DiPrete 2003].

The topic of homogamy has rarely been researched in the Czech Republic. The few existing comparative research studies of homogamy are the exception rather than the rule. Ultee and Luijkx [1994] included data from former Czechoslovakia in a comparative analysis of educational homogamy and mobility and tested the hypothesis that socialism had a positive influence on the openness of the social structure. Their paper revealed the unexpected effect of socialism on educational homogamy, showing that socialism contributed to the growth of educational homogamy, and, as a result, to the closing of the social structure. Boguszak [1990] also concluded that homogamy in the Czechoslovak and the Hungarian societies was higher than in the Netherlands. He suggested that the increase in homogamy was a behavioural response by people to the egalitarian measures adopted by the socialist regime. According to Boguszak, in these conditions of extreme economic equality, better-educated people tried to preserve status and cultural privileges, and therefore large numbers of them entered into marriages with equally (highly) educated people. Finally, after controlling for many economic, political and religious factors,

Smits, Lammers and Ultee [1998a] showed that Czechoslovakia had a relatively low degree of educational homogamy in comparison to other European countries.

In this article we will build upon previous analyses and study educational homogamy in Czech society, extending it here to cover the 1990s, a period of rapid economic, political and social change. Two basic research questions are posed: (1) Did educational homogamy in Czech society increase or decrease between 1988 and 2000? (2) Is the tendency of fiancés to enter into educationally homogamous marriages contingent upon their age?

The expected development of educational homogamy in Czech society after 1989 – hypotheses

Answers to the question of how educational homogamy developed in Czech society in the 1990s can be found at the macro-structural and micro-structural levels. The macro-structural answer is offered by the *modernisation theory* [Treiman 1970; Smits, Lammers and Ultee 1998a], which stresses the gradual elimination of social barriers and the gradual increase in social mobility. The micro-structural answer is offered by the *theory of marital exchange* [Elder 1969; Becker 1981; Smits 2003], which conceptualises marriage in terms of utility and the economic security of partners, and the *theory of the cultural similarity of spouses* [Kerckhoff and Davis 1962; DiMaggio and Mohr 1985; Bukodi 2002], which concentrates on the importance of education in defining the cultural status of spouses and highlights its importance for the consensus of partners in a marriage.

The *theory of modernisation* argues that increasing geographical mobility, urbanisation, and the introduction and expansion of a unified educational system [Treiman 1970] have expanded the range of potential partners from which young people can choose their spouses. Mass communication and the homogenisation of society contribute to more widespread similarities in value orientations, lifestyles, leisure time activities, language and taste; in short, to an expanding group of people with whom one shares a "common universe of discourse" [DiMaggio and Mohr 1985] and among whom one is more likely to find a mate. Therefore, we could, ceteris paribus, expect declining educational homogamy over time.

However, modern educational expansion also increasingly structures the marriage markets. Because people in modern societies spend, on average, more time at school then ever before, the relative importance of educationally structured marriage markets is likely to grow over time. This is likely to lead to an increased tendency toward entering into educationally homogamous marriages [Blossfeld and Timm 2003; Kalmijn and Flap 2001].

Smits, Lammers and Ultee [1998a] shows that educational homogamy increases only in the early phases of economic development; it then peaks, and begins falling at the start of the 'post-materialistic era', arguably in relation to the proliferation of the ideal of romantic love. They empirically demonstrate that the re-

lationship between educational homogamy and economic development takes the form of an inverted 'U' shape. They suggest that this pattern emerges because the forces leading to reduced educational homogamy prevail at higher levels of economic development, while the early stages of development augment educational homogamy.

The *theory of marital exchange* is based on the economic theory of marriage and the traditional model of calculating the benefits and costs of marriage. Gary Becker [1981], a proponent of this approach, claims that the relative advantages of marriage are the result of men specialising in paid work and women specialising in unpaid work. In traditional societies, where there is a high degree of division of labour in a marriage, a heterogamous spousal status is more advantageous than homogamous. The growing economic potential of women, however, leads to *both* partners assessing before marriage the potential economic contribution of the spouse to the family budget, and both fiancés logically prefer a partner with higher status potential [Blossfeld and Huinink 1991; Mare 1991; Sweeney 2002], a behaviour referred to as status attainment or status seeking [Smits, Lammers and Ultee 1998a, 1998b]. Under the pattern of the individual preference of both sexes, when equilibrium is achieved on the marriage market, it tends to be educationally homogamous rather than educationally heterogamous [Kalmijn 1991a, 1998].

Similarly, the *theory of cultural similarity of spouses* predicts that educational homogamy will increase over time. First, it points out that partner choice may also be driven by non-economic individual preferences. People may, for instance, have a preference for a partner with similar values and attitudes; they may, consciously or unconsciously, prefer someone with a similar language, taste or lifestyle [Kalmijn 1994, 1998; DiMaggio and Mohr 1985, 1994]. Because the idea of who is an attractive partner, as well as lifestyles, behaviours, values, attitudes and taste are all stratified in society [Birkelund and Heldal 2003; DeGraaf 1991; DiMaggio and Mohr 1985; Lamb 1989; Mohr and DiMaggio 1995; Tomlinson 2003], a preference for cultural similarity between partners will also lead to educational and status homogamy. As the relationship between education and attitudes, values, lifestyles and cultural preferences tends to increase in times of rapid social change, it is also likely to have grown during the post-socialist transition and therefore contributed to an increase in educational homogamy.

Based on the *theory of cultural similarity of spouses* and the *theory of marriage exchange* we believe that the economic, social and cultural transformation of Czech society in the 1990s led to an increase in educational homogamy, because the social transformation also resulted in an increase in social and economic insecurity and greater social and economic stratification. Since 1989, the general unemployment rate [Frýdmanová et al. 1999] and the number of long-term unemployed [Mareš, Sirovátka and Vyhlídal 2003] have increased, and the correlation between unemployment and the level of education have become more pronounced [Frýdmanová et al. 1999]. Moreover, economic returns to education have dramatically increased [Večerník 1999] and the relationship between education, economic income and em-

ployment status has become more pronounced [Matějů and Kreidl 2001]. The perceived importance of education for achieving success in life has also risen [Kreidl 2000]. Based on these facts, we expect that educational homogamy has increased in Czech society since 1989 (Hypothesis 1). This trend should be most pronounced in first marriages, where the criterion of education is a more important indicator of the future socio-economic position of a spouse than is economic income [Kalmijn 1994].

At the same time, we expect that not all segments of the Czech population will record the same degree of educational homogamy. For example, a number of authors – Mare [1991] using the American population, Bukodi [2002] using the Hungarian population, Bernardi [2003] using the Italian population, and Chan and Halpin [2000] using the British population – have shown repeatedly that the likelihood of an educationally homogamous marriage decreases as the interval between graduation and entry into marriage grows. After graduation, the likelihood increases that pairs formed at school will gradually come apart. People then start looking for new partners in other environments (for example, at work) that are far more educationally heterogamous than school [see also Kalmijn 1994]. Based on these findings we do not expect the same degree of educational homogamy among marriages formed before spouses have reached the age of thirty and among marriages formed after spouses have reached the age of thirty. We believe that in Czech society in the 1990s, educational homogamy was greater among younger couples than among couples entering marriage at later ages (Hypothesis 2).

Data, absolute measures of homogamy and analytical methods

The data we used to test our hypotheses were drawn from official statistics collected and published by the Czech Statistical Office [*Pohyb obyvatelstva* 1989, 1992, 1995, 1998, 2001]. The data are on all new marriages concluded between men (*M*) and women (*W*) according to education (elementary, vocational training, secondary and tertiary) and age (*A*) of entering into marriage (up to 29 years of age, and 30 and more years of age[1]) in selected years (*Y*) (1988, 1991, 1994, 1997 and 2000). As an aggregate the data take the form of a four-way table ($M \times W \times A \times Y$), which we clustered according to marriage age and years into ten ($A \times Y = 10$) two-way tables showing marriages between men and women ($M \times W$) by education level (see Table 1). The main diagonals in these tables show educationally homogamous marriages; the figures above the main diagonals represent marriages where the woman has attained a higher educational level than the man; and the figures below the main diagonals show marriages where the man has attained a higher educational level than the woman. The greater the distance of each number in each table from the main diagonal, the greater the educational disparity between the spouses.

[1] If one of the partners in a married couple was over 29 and the other below 29, we included this marriage in the 30 and over category.

Table 1. Frequency distribution of new marriages by education and marriage age in 1988, 1991, 1994, 1997 and 2000 in the Czech Republic.

Year	Man's education level	Up to age 29 — Woman's education level					Age 30 and over — Woman's education level				
		EL	VC	SE	TE	Total	EL	VC	SE	TE	Total
1988	EL	3 741	1 659	1 150	54	6 604	3 843	736	738	101	5 418
	VC	3 473	16 564	9 520	285	29 842	2 092	3 695	2 314	258	8 359
	SE	1 274	4 301	12 119	941	18 635	765	977	2 634	587	4 963
	TE	93	308	2 622	1 688	4711	185	219	1 496	1 026	2 926
	Total	8 581	22 832	25 411	2 968	59 792	6 885	5 627	7 182	1 972	21 666
1991	EL	2 938	1 577	942	35	5 492	2 580	608	631	84	3 903
	VC	3 114	16 573	8 121	233	28 041	1 579	3 312	2 016	213	7 120
	SE	1 077	3 996	10 518	725	16 316	578	885	2 704	525	4 692
	TE	78	313	2 121	1 133	3 645	136	183	1 510	935	2 764
	Total	7 207	22 459	21 702	2 126	53 494	4 873	4 988	6 861	1 757	18 479
1994	EL	2 498	1 071	660	26	4 255	1 921	547	408	66	2 942
	VC	2 009	13 224	5 888	184	21 305	1 250	3 412	1 819	219	6 700
	SE	731	3 171	8 020	691	12 613	475	954	2 437	537	4 403
	TE	56	242	1 739	1 267	3 304	127	264	1 566	961	2 918
	Total	5 294	17 708	16 307	2 168	41 477	3 773	5 177	6 230	1 783	16 963
1997	EL	1 546	929	537	30	3 042	1 869	562	453	121	3 005
	VC	1 610	10 926	6 116	261	18 913	1 355	4 293	2 219	316	8 183
	SE	526	2 623	8 080	810	12 039	520	1 268	3 249	696	5 733
	TE	47	195	1 616	1 427	3 285	141	310	1 863	1 290	3 604
	Total	3 729	14 673	16 349	2 528	37 279	3 885	6 433	7 784	2 423	20 525
2000	EL	1 183	664	421	38	2 306	1 397	495	361	94	2 347
	VC	1 173	8 246	6 261	356	16 036	1 179	4 690	2 591	336	8 796
	SE	409	2 122	8 329	1 100	11 960	433	1 227	3 805	821	6 286
	TE	43	162	1 604	1 803	3 612	132	322	2 021	1 503	3 978
	Total	2 808	11 194	16 615	3 297	33 914	3 141	6 734	8 778	2 754	21 407

Note: EL means elementary school, VC means vocational school, SE means secondary school and TE means tertiary education or university.

Source: *Pohyb obyvatelstva* 1988, 1991, 1995, 1997, 2000. Prague: Czech Statistical Office 1989, 1992, 1996, 1998, 2001.

Table 2: Educational assortative mating by year and marrige age in the Czech Republic (%).

Year & Age	Homogamous marriage	Female hypogamy & male hypergamy	Female hypergamy & male hypogamy	*N* (100%)
1988	55.62	22.53	21.85	81 458
up to age 29	57.05	22.75	20.20	59 792
over age 30	51.68	21.86	26.46	21 666
1991	56.54	21.83	21.63	71 973
up to age 29	58.24	21.76	20.00	53 494
over age 30	51.58	22.06	26.36	18 479
1994	57.79	20.65	21.56	58 440
up to age 29	60.30	20.54	19.16	41 477
over age 30	51.47	21.20	27.33	16 963
1997	56.54	22.57	20.89	57 804
up to age 29	58.96	23.29	17.75	32 279
over age 30	52.14	21.27	26.59	20 525
2000	55.95	24.48	19.57	55 321
up to age 29	57.67	26.06	16.27	33 914
over age 30	53.23	21.95	24.82	21 407

Note: Homogamous marriage means that the man's education level is the same as the woman's education level, female hypogamy and male hypergamy means that the woman's educational level is higher than the man's educational level; female hypergamy and male hypogamy means that the woman's educational level is lower than the man's educational level.

The sum of all total frequencies on, above and below the main diagonals by marriage age and year is given in Table 2. It is possible to see that the percentage of educationally homogamous marriages did not change much in Czech society during the 1990s. In 1988 and in 2000, the education of the man corresponded to the education of the woman in more than one-half of all new marriages. With respect to marriage age, young people (up to the age of 29) were more educationally homogamous in the 1990s than older people (30 and older). The percentage of marriages in which the woman attained a higher educational level than the man and the percentage of marriages in which the woman attained a lower educational level than the man were reversed by age in individual years. Female hypogamy and male hypergamy occurred more frequently among younger married couples; female hypergamy and male hypogamy occurred more frequently among older married couples.

These figures show the absolute educational homogamy, hypergamy and hypogamy for men and women by age during the 1990s. However, they do not take into account the structural circumstances that lead men and women to enter into a certain type of marriage. For example, marriages between women with secondary education and men with vocational training are contingent upon the absolute numbers of men and women in these educational categories: there are more female secondary school graduates than male secondary school graduates, and there are more men with vocational training than women with vocational training [*Pohyb obyvatelstva*, 1989, 1992, 1995, 1998, 2001]. Thus, female hypogamy and male hypergamy are to some degree forced. The situation is similar in other educational categories. Therefore, the absolute figures are not considered here to be relevant indicators of the relationships between the selected variables. They can only be taken as illustrative in testing our hypotheses. Although they show the percentage of individual types of marriages and their variation by time and age, they do not indicate the extent to which this variation is a result of people's intentions or the extent to which it is forced by structural circumstances.

We shall test the hypotheses using log-linear and log-multiplicative analyses, which make is possible for us to describe the relationships between variables while controlling for the different numbers of men and women at individual educational levels, i.e. any association is not influenced by marginal frequencies. The goal of this analysis is to estimate a parsimonious model as well as an accurate model, which will satisfactorily explain the structure of the data [for more on this type of analysis, see Hout 1983; Xie 1992; Clogg and Shihadeh 1994; Powers and Xie 2000; Agresti 2002].

We analysed the data in two steps. In the first step, we divided Table 1 by marriage age into two three-way tables and estimated separate models for young married couples (up to 29 years of age) and for older married couples (30 and older) (Analysis I – see below). In this case, because we wanted to test Hypothesis 1 about the trends in educational homogamy of concluded marriages among young people separately from marriages among older people, marriage age became the differential criterion. There were two aims behind this step: one was to eliminate re-marriage from the testing of Hypothesis 1 (up to the age of 29, repeated marital choice occurs rarely; the frequency increases after the age of 30) because we thought it might distort the test (in the case of remarriage, a person is influenced by their first choice of spouse, and will probably be partial to different partnership criteria, especially if that person has a dependent(s) from the first marriage – a child or children). The other and more important aim was to test whether the pattern of association among young fiancés and older fiancés is the same. In the second step (Analysis II), we estimated models for all the data (all of Table 1) and again tested Hypothesis 1 about the trends in educational marital choice during the 1990s, and Hypothesis 2 about the influence that the age of fiancés at the time of their marriage had on educational homogamy in Czech society in the 1990s.

Results of the analyses

At the beginning of each of the two analyses we estimated a saturated model that accurately simulated the structure of the data. Then, for both types of analyses, we estimated a model of conditional independence, which presupposes no relationship between the variables. When it was discovered in either of the analyses that the independence model fits the data very poorly, we tested the data against models that differed from the saturated model with regard to constraints in two-way interactions – within tables – and with regard to constraints in multi-way interactions – across tables.[2]

Analysis I

Table 3 presents the results of the models estimated for Analysis I, which tested the relationship between three variables (M – men, W – women, Y – years) for young married couples and older married couples separately.[3] Model A1 is a conditional independence model. This model was designed to eliminate the relationship between M and W when the third variable Y is controlled. The differences between the expected frequencies of the model and the measured frequencies in the tables are high, both among young married couples and among older married couples. This model does not fit the data. Model A2 differs from Model A1 heterogeneously (subscript I), i.e. for each table separately by blocked main diagonals B (see Image 1, constraint B).[4] Even when the difference between the model frequencies and the measured frequencies in both age categories decreased, the difference between them remained so large that this model could not be accepted.

The other four models (B1, B2, C1 and C2) are constant social fluidity models [Erikson and Goldthorpe 1992]. These models differ by heterogeneously blocked main diagonals and constraints placed on three-way interactions. Model B1 and Model B2 do not presuppose any occurrence of a three-way interaction; the relationship between M and W by Y is constant. The difference between Model B1 and Model B2 is that B1 was estimated without blocked main diagonals and B2 was es-

[2] We estimated all the models using the LEM program [Vermunt 1997]. The input data and the syntax for the calculation are freely available for downloading and replication at http://www.fss.muni.cz/~katrnak

[3] In order to test the fit of the model, we used the log-likelihood ratio chi-square statistic (L^2), which is a deviation of the estimated frequencies from the measured frequencies (when projecting a saturated model, $L^2 = 0$). Also, we worked with the index of dissimilarity (Δ) and with the Bayesian information criterion (BIC) [Raftery 1986, 1995].

[4] In mobility and similar contingency tables, frequencies in the fields along the main diagonal are, unlike the other fields in the table, usually very high because they represent the 'hereditary effect'. Therefore, it is customary to block the main diagonals in the table, whereby the hereditary effect is eliminated.

Table 3. Goodness-of-fit measures of models of educational assortative mating, calculated separately for age group (– 29) and age group (30+) in the Czech Republic in 1988, 1991, 1994, 1997 and 2000.

		Up to age 29			Age 30 and over		
Model	d.f.	L^2	Δ	BIC	L^2	Δ	BIC
A1) YM YW	45	85 101.0	24.1	84 546	41 420.5	27.2	40 904
A2) YM YW $(B)_l$	25	12 045.7	4.9	11 739	7 448.9	7.9	7 161
B1) YM YW MW	36	187.5	0.9	–256	116.4	1.2	–298
B2) YM YW MW $(B)_l$	20	27.1	0.2	–220	34.2	0.4	–196
C1) YM YW $(MW)_u$	32	127.1	0.7	–267	101.3	1.0	–267
C2) YM YW $(MW)_u$ $(B)_l$	16	25.0	0.2	–172	26.9	0.4	–157
D1) model A2 $(D)_o$	23	85.6	0.4	–198	163.8	0.9	–101
D2) model A2 $(D)_x$	19	83.4	0.4	–152	157.5	0.9	–61
E1) model A2 $(D\ P)_o$	22	69.6	0.3	–202	88.2	0.6	–165
E2) model A2 $(D\ P)_x$	18	67.9	0.3	–154	82.7	0.5	–124
F1) model A2 $(D\ P\ S)_o$	22	79.7	0.4	–192	78.5	0.7	–175
F2) model A2 $(D\ P\ S)_x$	18	77.4	0.4	–145	73.2	0.6	–134

Note: Y – years; M – men; W – women; B – blocked main diagonals; D – distance; P – effect of sex on heterogamy; S – educational status effect on entering into marriage; subscript l – heterogeneous effect among tables; subscript o – homogeneous effect among tables; subscript u – uniform effect among tables; subscript x – log-multiplicative effect among tables; L^2 is the log-likelihood ratio chi-square statistic; d.f. refers to the degrees of freedom; BIC is the Bayesian Information Criterion (BIC= L^2 – (d.f.) log (N)), in which N is the total number of cases (for the age group up to 29 years N is 225 956; for the age group 30 and over N is 99 040); Δ is the index of dissimilarity, which indicates the proportion of cases misclassified by the model.

timated with heterogeneously blocked main diagonals. The two remaining models, Model C1 and C2, were also estimated both without blocked and with heterogeneously blocked main diagonals; what differentiates them from the two previous models is the uniform effect (subscript u) between two-way interactions by Y [Yamaguchi 1987]. This means that the two-way interaction between the education of M and W was the same in all the tables, and the three-way interaction between the tables was estimated as a sum of this two-way interaction and an estimated parameter β, which indicates the change in the strength of the two-way interaction by Y. With respect to both the younger and the older couples, Models B1 and C1 do not, according to conventional statistics, satisfactorily reproduce the data (L^2 is too high, and Δ is too low given the *d.f.*). The two remaining models, Models B2 and C2, fit the data satisfactorily. These models, however, are not very parsimonious because the two-way interaction is a full interaction (without a constraint). Because Models

Image 1. Design of factors for two-way association by constraints.

Constraint *B*

Man's education \ Woman's education	EL	VT	SE	TE
EL	1	5	5	5
VT	5	2	5	5
SE	5	5	3	5
TE	5	5	5	4

Constraints *B, D*

Man's education \ Woman's education	EL	VT	SE	TE
EL	1	5	6	7
VT	5	2	5	6
SE	6	5	3	5
TE	7	6	5	4

Constraints *H, D, P*

Man's education \ Woman's education	EL	VT	SE	TE
EL	1	6	7	8
VT	5	2	6	7
SE	7	5	3	6
TE	8	7	5	4

Constraints *H, D, P, S*

Man's education \ Woman's education	EL	VT	SE	TE
EL	1	6	7	8
VT	5	2	5	7
SE	7	6	3	6
TE	8	7	5	4

Note: B – blocked main diagonals; D – distance; P – effect of sex on heterogamy; S – educational status effect on entering into marriage

B2 and C2 fit the data better than Models B1 and C1, we estimated other models restricting two-way interactions, with heterogeneously blocked main diagonals.

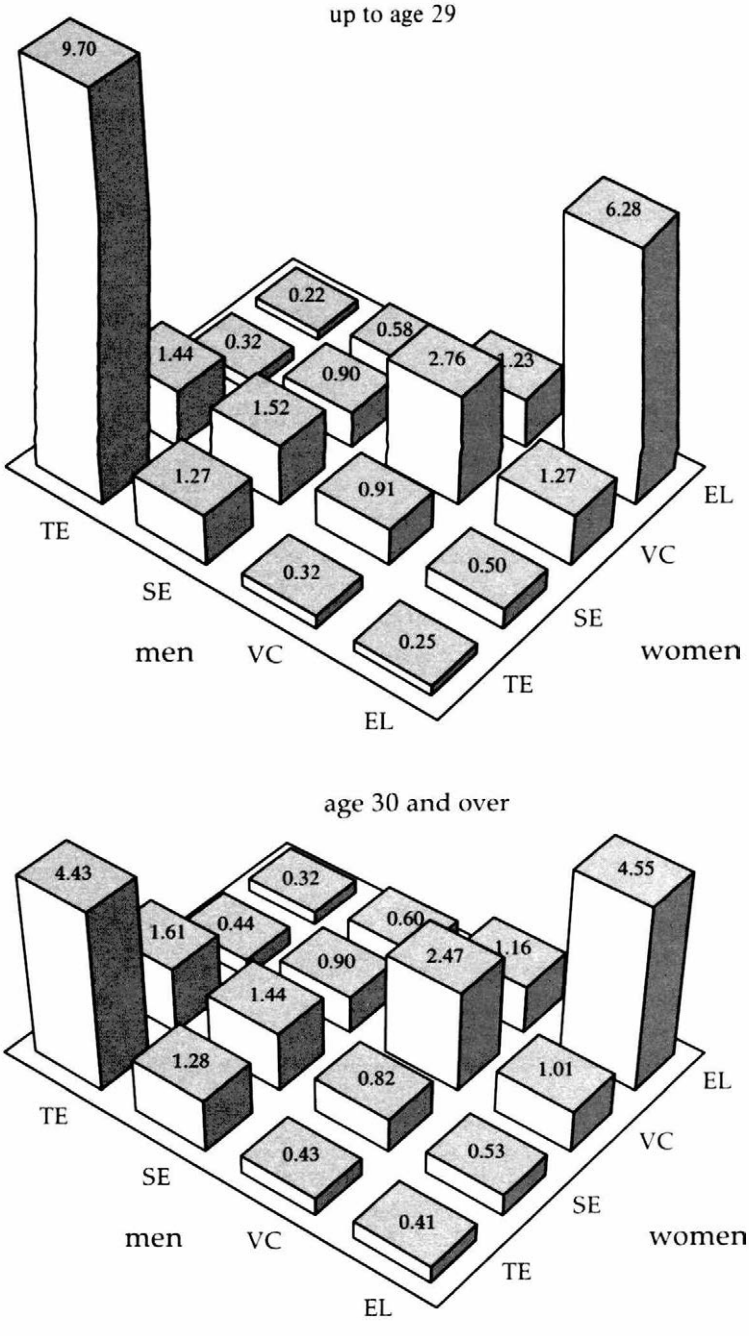
We began with the model of conditional independence, Model A2, and modelled each constraint of the two-way interaction as homogenous (subscript *o*) and as log-multiplicative (subscript *x*) between the tables. The homogenous effect means that a three-way interaction does not exist. The log-multiplicative effect was constructed on the basis of a principle similar to the uniform effect. A two-way interaction between *M* and *W* was estimated as the same for all the tables, and the three-way interaction among the tables was modelled as a factor of this two-way interaction and the estimated parameter φ/ϕ (which shows changes in the strength of the two-way interaction by Y). Unlike the uniform effect, however, the log-multiplicative effect does not presuppose an arrangement of rows and columns in the table and is

also more appropriate for modelling individual constraints in two-way interactions (for more on this, see Xie [1992]).

Models D1 and D2 are distance models [Goodman 1984]. In this two-way interaction there are heterogeneously blocked main diagonals (*B*), and three parameters (*D*) were estimated for each set of equally distant fields above and below the diagonal (see Image 1, constraints *H, D*). Studies on assortative mating in the Czech population [c.f. Možný 1983, Vlachová 1996; Katrňák 2001] show that there is a greater tendency towards hypergamy among women than men. Based on this conclusion we estimated parameter *P* (the effect of sex on heterogamy) in Models E1 and E2; the parameter for those fields just below the main diagonals was different from the parameter for those just above the main diagonals. The equation of the two-way interaction otherwise remained the same as in the preceding models (see Image 1, constraints *H, D, P*). In the last two models (F1 and F2) the number of parameters in two-way interactions does not change. We have only exchanged the parameter for a woman with vocational training and a man with secondary education for the parameter for a woman with secondary education and a man with vocational training, and defined this exchange as the educational-status effect (*S*) on entering into marriage (see Image 1, constraints *H, D, P, S*). In light of the fact that in the Czech population men with vocational training outnumber women with vocational training, and women with secondary education outnumber men with secondary education, the probability that men with vocational training and women with secondary education will enter into a heterogamous marriage differs from that for men with secondary education and women with vocational training (the situation is similar in the case of elementary and tertiary education). This heterogamy by sex and education is accompanied by the complementarity of income between male and female partners with different educational levels (the same income level for men with a lower educational level as for women with a higher educational level) and by a tendency among women with elementary education towards hypergamous marriages with men with vocational training and a tendency among women with secondary education towards hypergamous marriages with men with college education [Katrňák 2001]. Therefore, we used the same parameter for hypergamy and hypogamy among women with secondary education (in the first fields, below and above the main diagonal in each table) as for hypergamy and hypogamy among men with vocational training (in the first fields, above and below the main diagonal). Then, in the first fields above and below the main diagonal in each table we used the same parameter for women with vocational training (and their heterogamy) and for men with secondary education (and their heterogamy). Each of these six models (D1, D2, E1, E2, F1 and F2) fits the data satisfactorily; among younger married couples the difference between the modelled and measured frequencies is slightly less than among older married couples.

With the exception of the first two models (A1, A2), which tested the independence between the variables, and Models B1 and C1, which tested the constant occurrence of an interaction between *M* and *W* over time without restricting it, all

Figure 1. Standardised interaction parameters in exponential form (e^b) estimated by model C1 for entering into marriages, calculated separately for up to age 29 and age 30 and over.



the estimated models, according to conventional statistics (L^2, Δ and *d.f.*), reproduce the table data satisfactorily. According to the *BIC* criterion, in the case of young fiancés the model that most closely corresponded to the data is Model C1; in the case of older fiancés, it is Model B1. A comparison of the two-way interaction parameters of Model C1 is shown in Figure 1.[5] We can see that educational homogamy is generally higher among younger fiancés than among older fiancés. In both age categories, homogamy is strongest among fiancés with college education and fiancés with elementary education.[6] Homogamy falls significantly as one approaches the center of the table along the main diagonal. This model and Models B1, B2 and C2 are full two-way interaction models. They do not restrict the structure of the data in the table. Therefore, they are not appropriate for answering the question of whether the pattern of association between men and women according to education is different between young fiancés and older fiancés.

Among the remaining models, according to the *BIC* criterion, Model E1 reproduces the structure of young fiancés slightly better, and Model F1 reproduces the structure of older fiancés slightly better. Nevertheless, differences in the fit of these models relating to younger and older fiancés are not substantively significant, and therefore we consider the pattern of association for marital educational pairing among younger and older fiancés in the Czech population to be identical.

Model E1 for young married couples and Model F1 for older married couples presuppose constant strength in the relationship between the education of *M* and *W* by *Y*. A comparison of the size of the association parameters φ in Models D2, E2 and F2 leads us to the same conclusion: an association between the education of the man and the woman in choosing a husband or a wife among younger or older fiancés does not change over time. The social, political and cultural changes that have been taking place in Czech society since 1989 have not had a significant impact on the educational choice of a husband or a wife. The analysis disproved Hypothesis 1, that educational homogamy increased between 1988 and 2000 in the age categories of up to age 29 years and 30 and over.

[5] The figures are in exponential form, they can acquire values in the interval <0; ∞>; a figure of '1' represents an occurrence corresponding to a random occurrence (without any relationship between variants of the variables), a figure above 1 represents a factor of over-representation of the occurrence compared to the average and a figure below 1 represents the factor of under-representation of the occurrence compared to the average. These figures result from *effect coding*; in and of themselves they do not have any meaning.

[6] Bukodi [2001] reached the same conclusion using the Hungarian population. The greatest educational homogamy in Hungarian society can be found among people with the lowest and highest educational levels.

Analysis II

In Analysis II we worked with four variables (*M* – men, *W* – women, *Y* – years, *A* – age) and again tested Hypothesis 1 (now on the total sample) and Hypothesis 2 with regard to the influence of the age of the fiancés on educational homogamy. The models estimated in this analysis are identical to the models estimated in Analysis I. First, we estimated the conditional independence model (the relationship between *M* and *W* upon entering into marriage disappears when we control for *Y* and *A*). Then we estimated the same model with heterogeneously blocked main diagonals (constraint *H* – see Image 1). As shown in Table 4 (Models A1 and A2), none of these models satisfactorily reproduce the data from the table. The other models (Models B1, B2, C1 and C2) presuppose a constant two-way interaction between *M* and *W* by *Y* and *A*. As in Analysis I, they differ by the heterogeneously blocked main diagonals and by the constraints of the four-way interactions (Models B1 and B2 do not

Table 4. Goodness-of-fit measures of models of educational assortative mating in the Czech Republic in 1988, 1991, 1994, 1997 and 2000.

Model	d.f.	L^2	Δ	BIC
A1) YAM YAW	90	126 521.5	25.0	125 379
A2) YAM YAW $(B)_l$	50	19 494.6	5.8	18 860
B1) YAM YAW MW	81	2 049.1	2.3	1 021
B2) YAM YAW MW $(B)_l$	45	268.5	0.5	-303
C1) YAM YAW $(MW)_u$	72	1082.5	1.8	169
C2) YAM YAW $(MW)_u$ $(B)_l$	36	113.6	0.4	-343
D1) model A2 $(D)_o$	48	390.5	0.6	-219
D2) model A2 $(D)_{x(R)}$	44	387.0	0.6	-171
D3) model A2 $(D)_{x(RV)}$	39	241.1	0.5	-254
E1) model A2 $(D\ P)_o$	47	385.8	0.6	-211
E2) model A2 $(D\ P)_{x(R)}$	43	382.6	0.6	-163
E3) model A2 $(D\ P)_{x(RV)}$	38	238.5	0.5	-244
F1) model A2 $(D\ P\ S)_o$	47	316.9	0.6	-280
F2) model A2 $(D\ P\ S)_{x(R)}$	43	314.2	0.6	-232
F3) model A2 $(D\ P\ S)_{x(RV)}$	38	167.6	0.5	-315

Note: Y – years; A – age; M – men; W – women; B – blocked main diagonals; D – distance; P – effect of sex on heterogamy; S – educational status effect on concluding marriage; subscript l – heterogeneous effect among tables; subscript o – homogeneous effect among tables; subscript u – uniform effect among tables; subscript x – log-multiplicative effect among tables; L^2 is the log-likelihood ratio chi-square statistic; d.f. refers to the degrees of freedom; BIC is the Bayesian Information Criterion (BIC= L^2 – (d.f.) log (*N*)), in which *N* is the total number of cases (326 996); Δ is the index of dissimilarity, which indicates the proportion of cases misclassified by the model.

Table 5. Association parameters φ of model F2 (by marriage age) and of model F3 (by marriage age and year) for educational homogamy in the Czech Republic.

Model	Age	1988	1991	1994	1997	2000
F2)		0.444	0.453	0.455	0.440	0.445
F3)	up to age 29	0.480	0.476	0.490	0.498	0.491
	over age 30	0.391	0.417	0.414	0.388	0.405

Note: The φ parameters are normalised in the case of age (model F2) so that $\Sigma\varphi^2 = 1$, and in the case of year and age (model F3) so that $\Sigma\varphi^2 = 2$.

presuppose an occurrence of a four-way interaction, Models C1 and C2 model it as uniform). The fit of these models (with the exception of models with blocked main diagonals (B2, C2)) is not satisfactory. Therefore, as in Analysis I, we estimated other models with heterogeneously blocked main diagonals. Model D1 is a homogeneous distance model that presupposes an unchanging structure for the two-way interaction by *Y* and *A* (constraints *H*, *D* – see Image 1). Model D2 differs from D1 by the three-way log-multiplicative effect by *Y*, and Model D3 in the four-way log-multiplicative effect by *Y* and *A*. Model E1 is based on Model D1, with the addition of the effect of sex (*P*) on heterogamy (constraints *H*, *D*, *P* – see Image 1). Models E2 and E3 differ from E1 by the three-way (by *Y*) and four-way (by *Y* and *A*) log-multiplicative effect. The last three models (Models F1, F2 and F3) are based on Model E1; they add the educational-status effect (*S*) on entering into marriage to the two-way interaction (constraints *H*, *D*, *P*, *S* – see Image 1). As in the previous models, they differ by constraints in multi-way interactions (F1 does not presuppose any occurrence of a multi-way interaction, F2 models the interaction as log-multiplicative by *Y*, and F3 as log-multiplicative by *Y* and *A*).

According to the *BIC* criterion and the conventional statistics (L^2 and Δ given the *d.f.*), and with respect to parsimony and accuracy, Model F3 fits the data the most satisfactorily. The estimated parameters of association φ between *M* and *W* by *Y* and *A* in this model are presented in Table 5 (to help illustrate, also provided are the parameters of association φ between *M* and *W* only by *Y* in Model F2). Although the values of parameter φ are more volatile in specific years in the age category 30-and-over than in the younger age group, we cannot speak of a tendency or even a trend. The measure of educational homogamy among men and women remained constant among young and older Czech fiancés in the course of the 1990s. Analysis of the data contained in Table 1 does not demonstrate the validity of Hypothesis 1 relating to an increase in educational homogamy. Nevertheless, the association parameters φ are different in specific years between young and older married couples (on average by 18%). In Czech society, people over 30 who enter into marriage are 18% less likely than people under 30 to marry a partner with the same educational level. We were not able to disprove Hypothesis 2 relating to the occurrence of less educational homogamy among people entering into marriage at a later age.

Conclusion and discussion

Our goal in this paper was to describe the development of educational homogamy in Czech society in the 1990s. We analysed all marriages between young (up to the marriage age of 29) and older (marriage age 30 and over) people in selected years (1988, 1991, 1994, 1997, and 2000) and tested two hypotheses. According to the first hypothesis, educational homogamy (especially among young fiancés) should have increased after 1989. According to the second hypothesis, the educational homogamy of marriages where the age of the fiancés is under 30 should be higher than those marriages where fiancés were older than 30 years of age.

The analysis did not confirm our first hypothesis. The relative educational homogamy remained constant between 1988 and 2000, both among young and older fiancés. As for the second hypothesis, our analysis did not disprove it. Among people who entered into marriage before the age of 30, the relative educational homogamy is 18% higher than among people who entered marriage after the age of 30. This difference remained practically the same between 1988 and 2000.

The finding that educational homogamy in Czech society in the 1990s did not change is very surprising. It means that during the transformation from socialism to capitalism, social barriers between people did not increase. This conclusion is at odds with the findings of the most recent mobility research studies [Gerber and Hout 2002; Pollak and Müller 2002], which have dealt with the transformation of the social structure in the 1990s in the post-communist countries. Gerber and Hout [2002] examined inter-generational social mobility in Russian society between 1988 and 2000 and showed that the social structure of Russian society was closing. Pollak and Müller [2002] reached the same conclusion when they compared inter-generational mobility in West and East Germany. The social structure in East Germany was indeed more open than the social structure of West Germany, but in both cases the social structure is gradually closing and social fluidity decreasing.

We believe that there are three possible explanations for the disparity between our findings about the constant measure of educational homogamy in the Czech Republic and the examples of the closing social structure in Russian and in East Germany.

The most likely explanation seems to be the decline in the marriage rate in Czech society after 1989. When we take another look at the total number of marriages in the selected years (Table 1), we see that while in 1988, 59 792 people in the 29-and-under age group entered into marriage, in 2000 only 33 914 people did. In the 1990s there was an increase in the number of people in the 29-and-under age group who remained single. With respect to education, these young singles are to be found especially among people with tertiary education [see Katrňák 2004] or, to put it differently, among people, who only rarely choose a spouse with a different educational level; homogamy among their group far exceeds rates of occurrence in the other educational groups (see Figure 1). We believe that our findings about the constant trends in educational homogamy after 1989 in Czech society may be due

to this decrease of young female and male college graduates in the marriage market. In such a case, the social structure in the Czech Republic during the 1990s would experience changes similar to those which Gerber and Hout [2002] identified in Russian society, and Pollak and Müller [2002] in the former East Germany. The measurement of educational homogamy in Czech society does not reflect these changes because young people with college education (who are otherwise very educationally homogamous) disappeared from the marriage market after 1989. However, this explanation for the different conclusions about the development of the social structure in post-communist countries is complicated by the constant educational homogamy in the older age group of fiancés (marriage age 30 and over). In this case, the number of marriages did not fall between 1988 and 2000 (see Table 1) and therefore homogamy should have risen; nevertheless, this did not occur.

Another possible explanation is that developments in Russian and German societies and developments in Czech society are diverging. However, we do not consider this conclusion to be acceptable. First, when compared to the countries of Western Europe, the social structures of the former socialist countries are still considered to be more similar than different [see Domański 2000]. Second, the economic, political, and cultural changes that all the post-socialist countries experienced during the 1990s are the same in content, intensity, and direction, and therefore their consequences are also similar.

The last possible explanation could lie in the different focal points of the research studies: our study examines educational homogamy, while the other two research studies in Russia and Germany analysed social mobility. The question is whether the relationship between an increase in educational homogamy and a decrease in social mobility [Ultee and Luijkx 1994; Smits, Lammers and Ultee 1998a, 1998b] also applies to the transforming countries of the former Soviet bloc, and whether the social mobility research study and the educational homogamy research study indicate one and the same thing – the opening (or closing) of the social structure.

Unlike the falsification of the first hypothesis, the verification of the second hypothesis (about the lower educational homogamy of marriages between partners at a later age) is not surprising. Mare's conclusion [1991] that the fall in educational homogamy is directly proportional to the increase in the interval between graduation and the age at marriage cannot however be accepted in this case. The average age upon entering into the first marriage in Czech society increased between 1990 and 2000 (among men from 24 to 28.8 years of age, and among women from 21.4 to 26.9 years of age [*Populační vývoj* 2001]); the interval between graduation (and entry into the labour market) and entry into marriage continued to increase during the 1990s. Nevertheless, because the difference between the educational homogamy among young and older fiancés remains practically the same over time (with the exception of minor annual fluctuations) we do not believe that this difference is a result of the increasing age of partners upon entering into marriage. The difference in the educational homogamy by age tends to be influenced rather by the different ex-

pectations concerning a partner's qualities according to age [Kalmijn 1994]. Young people tend to define these qualities in terms of cultural capital (expectations about the future economic capital of a partner). Moreover, they choose from a wider circle of potential brides and grooms, and therefore it is possible to find a greater occurrence of educational homogamy among them. Conversely, older people can rely on economic capital as the main criterion in spouse selection, as the foundation of the employment career of a partner already exists; they also choose from a narrower circle of potential spouses, and thus the occurrence of educational homogamy is lower. These differences in the conditions that young and older people face over the choice of their spouse are not likely to have changed much during the transformation from socialism to capitalism. In the Czech Republic, the difference between the educational homogamy of partners who married earlier and partners who married at a later age remained practically the same throughout the 1990s.

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Why Are They All So Eager to Retire? (On the Transition to Retirement in the Czech Republic)*

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Abstract: In an ageing Czech society, the age of retirement has become an important issue in the debates over how to reform the pension system. In this article, which deals with the transition to retirement, the central questions posed are what perspective Czechs have on the timing of their retirement, and whether they are beginning to prepare themselves for the eventuality that they will have to retire much later than has thus far been the case. Using the results from various Czech representative surveys, the paper uncovers the paradox of early retirement. This consists of contradictory links. The Czechs know that their society is ageing, that they are living longer and that the number of pensioners is increasing. They know also that after retirement their level of income (pension) will decrease substantially, having a serious impact on their standard of living. Yet despite these facts, middle-aged and elderly Czechs (45 years and older) not only are opposed to any increase in the statutory retirement age, but more frequently they even indicate a preference for early retirement. Interestingly, research conducted among the elderly has shown that many of those who are already retired today admit that they did not really want to retire. This article tries to find an explanation for this paradox in the mentality that exists with regard to retirement, which was formed by the peculiarities of the socialist labour market, and/or in the psychology of the life course.
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Introduction

As in other developed countries, the issue of an ageing population is currently one of the biggest political and social topics in the Czech Republic. Czech society is ageing and one of the causes of this is the radical change in reproductive behaviour. During the 1990s, the younger segments of the Czech population began to adopt fer-

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tility patterns similar to those of the second demographic transition, which in Western Europe began taking place at the beginning of the 1970s. Another cause is the dynamic increase in life expectancy, which occurred in the second half of the 1990s.[1] As a result, the process of population ageing in Czech society is extremely pronounced. According to the UN's latest projections, in the year 2050 the population of the Czech Republic will be among the oldest in the world.[2]

As in other ageing populations, the prospect of demographic ageing has incited debate on how to avert an old-age crisis by means of reforms to the pension system. Discussions became heated in the second half of the 1990s, when the transforming economy began to show signs of economic recession.[3] The worsening economic situation and the increasing state budget deficit produced debates on how to avert a crisis in public finance and on how to prevent the financial collapse of the pension system.

Reforming the pension system has thus become a hot issue in Czech social policy. The entire system will clearly have to undergo significant changes. As Müller [1999] has rightly pointed out, the onset of the system crisis that is currently being experienced is transformation-induced and not yet linked to population ageing. But considering that from 2005 onwards the process of demographic ageing in the Czech Republic will occur quite rapidly, owing to the relatively large baby-boom cohort of the late 1940s and to the extremely low birth rate during the late 1990s, and accompanied by the dynamic increase in life expectancy, it is clear that there is not much time left to carry out major changes to the system.

Generally speaking, the problem of transforming the pension system is quite complicated. Despite the fact that there exist various theoretical models for organising pension systems in ageing societies (for details see, e.g., Charlton and Mc Kinnon [2001]), their practical implementation is very difficultand no clear-cut models have been worked out yet. Many have argued that in the post-communist environment changes will have to include imposing stricter rules on granting entitlement to pensions. The statutory legal retirement age will have to be raised, along with the period of time during which premiums are paid. At the same time, the pro-

[1] The total fertility rate has hovered around 1.15 over the last five years and male life expectancy at birth increased from 67.5 in 1990 to 72.1 in 2001; the corresponding female figures are 76.0 and 78.5.

[2] According to UN projections, in the year 2050, 40% of the Czech population will be aged 60 and over, and the median age will be 51.7 [UN 2003]. The Czech Republic will therefore be among the countries with the oldest populations on earth, along with Japan, Slovenia, Latvia, and Italy.

[3] The Czech economy has lost its dynamism. While in 1995 GDP increased to 105.9%, as compared with 1990, it decreased to 100.5% in 1999 (and increased again slightly to 103.3% in 2001). Despite annual plans to balance the state budget, there was a deficit of CZK 1.6 billion in 1995, and this deficit gradually increased to CZK 29.6 billion in 1999, thus reaching 67.7 billion, or 3.18% of GDP, in 2001. The unemployment rate increased from 2.9% in 1995 to 9.8% in 2002.

tective role of the state will have to be reduced and the responsibility of preparing for old age shifted more towards the individual. Others believe that the state can maintain its decisive role in the pension system: raising the retirement age and improving the performance of the national economy will suffice to keep the system running in a satisfactory way.

Concrete solutions will of course differ throughout post-communist Europe, but the key principle seems to be increasingly clear: as Daly [1997] has pointed out in realistic terms, in the near future most Europeans will have to work longer than they used to while receiving much lower pensions from their governments. A similar message was sent to ageing societies by *The Economist* in its recent survey of retirement: "the promises governments have made to people retiring today are too large to be met in full. As a result, people will have to work longer, and retire later, than they do now" [*The Economist* 2004: 4]. The Czechs, I dare say, will not prove to be an exception to this rule.

No matter what form Czech pension reform ultimately takes, one thing is quite certain now: It must include an increase in the retirement age. The retirement age in the Czech Republic is currently one of the lowest in Europe (see below). Nonetheless, as the French, German, and Austrian examples have shown, increasing the set retirement age is quite a thorny issue, both politically and socially. In the Czech Republic, the subject has begun to take the form of a social problem; as a result, retirement has become a very topical issue in social debate.

From a sociological point of view, retirement is a very important element in an individual's life course. Leaving the world of work for the world of 'leisure' often signifies a change in roles, a change in everyday stereotypes, reduced social contacts and, for many, even a lowered standard of living. It is clear that the manner in which one retires, and the nature of retirement itself, is significantly affected by the economic, political and cultural aspects of society as a whole. In other words, retirement is socially constructed [Philipson 1993].

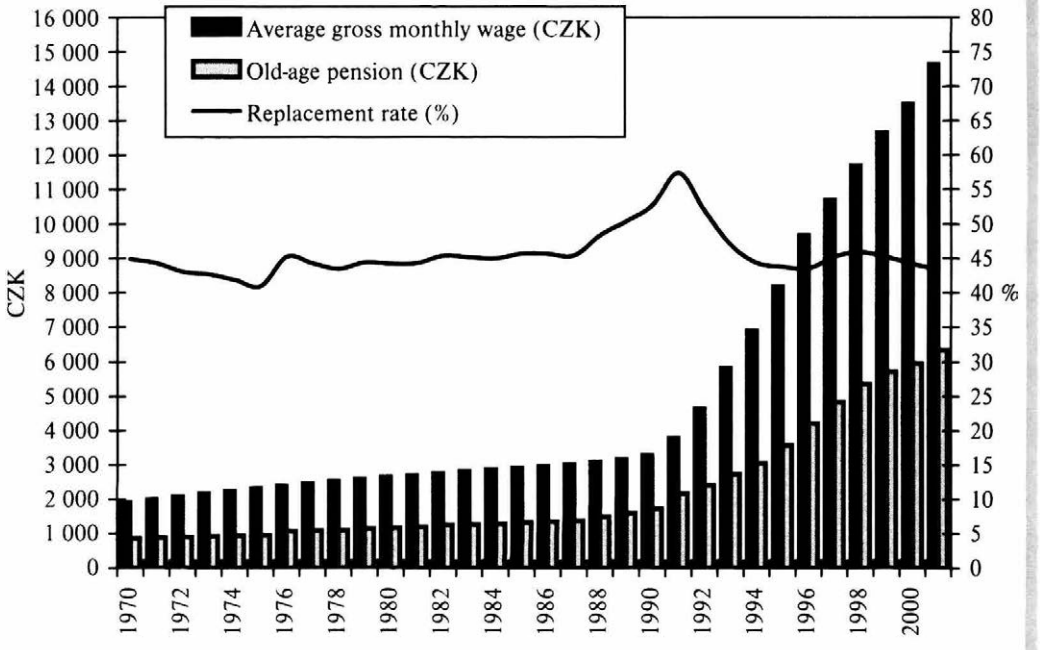
Czech sociology (and Czech social gerontology) has not addressed overmuch attention to the issue of the transition to retirement. As a result there is still no comprehensive study that describes and analyses this phenomenon. In this paper, an attempt will be made to fill the gap in Czech knowledge on retirement. For understandable reasons, the paper is mainly descriptive in character, although it is not entirely lacking analytical features. The central questions are: What perspective on the timing of their retirement do Czechs have and are they beginning to prepare themselves for the eventuality that they will have to retire much later than has thus far been the case?

Before we begin to answer these central questions, it is first necessary to briefly outline the nature of the Czech pension system, because it is a macro-structural framework which itself greatly affects the Czech timing of retirement.

2. The context – the Czech old-age pension system

The Czech old-age pension system is based on two pillars: the first one is a public mandatory pay-as-you-go (PAYG) system, which provides universal coverage and grants pensions to those who have contributed to the system for at least 25[4] years and who have reached the age of 61 (males) or 54–58 (females).[5] The compulsory contribution rate is 26%, of which 19.5% is paid by the employer and 6.5% by the employee. The coverage under the first pillar is very high, and the pensions from this

Figure 1. Gross monthly wages, old-age pensions and the replacement rate, Czech Republic 1970–2001



Source: Czech Statistical Office

[4] Up until 1996, an individual's income over the last ten years was used as the base from which to calculate their pension. Since then, each year one year has been added so that by 2016 one's income over the last 30 years of working will be relevant in calculating the level of one's pension.

[5] At the moment we are in the middle of a phase of incremental increases to the statutory retirement age. The decision to increase the age was taken in 1995, when the statutory retirement age was 60 for men and 53–57 for women, depending on the number of children a woman had (childless women could retire at the age of 57, and for every child a woman had raised, the age was reduced by one year). In 1995, annual increases to the statutory retirement age began: two months are added annually for men, and four months for women. By January 1, 2007, the retirement age will be 62 for men and 57–61 for women.

public system constitute the main portion of income for elderly Czechs. The replacement rate is about 42–43% of mean income before taxes[6] (see Figure 1), but the system (as we shall see further on) has a very strong re-distributive character, justified in terms of 'social justice'; therefore, higher income groups experience a much lower income replacement rate.

The second pillar is a system of voluntary private pension funds, established in 1994. This supplementary private pension scheme has yet to acquire a more significant place in the pension system, as the clientele of such pension funds are primarily people of pre-retirement age (a typical client of a private pension fund between the age of 50 and 55), with relatively low premiums. At present, there are 14 private pension funds in the Czech Republic (out of the 44 which began operating in 1994), with a clientele of approximately 2.5 million people, amounting to about 45% of the population aged 18–59. This is not a negligible figure, but the problem is that the savings in these funds are typically based on payment of CZK 300–400 monthly. This is a relatively low sum, given that the average 1999 monthly wage is about CZK 15 000.[7] Thus, it can hardly be expected that as such these funds will significantly improve the level of future retirement benefits for these people.

3. Retirement and early retirement

In contemporary modern societies, retirement has become a significant element in the life cycle of an individual. There is research indicating that views on retirement are on the whole positive [Atchley 2000] and that the popularity of retirement, particularly early retirement, is growing [Quadango and Hardy 1996]. With respect to the main subject of this article, the timing of retirement, it has become clear that "retirement decisions are shaped by individual preferences, but that individual choices are made relative to the opportunities and constraints that workers encounter" [Quadango and Hardy 1996: 326].

In the Czech Republic, these opportunities and constraints take the form of a kind of chain, which, when connected, creates *the paradox of early retirement*. The individual links in this chain are as follows:

A) With regard to the state of health and life expectancy, after years of stagnating figures during the communist regime Czechs are now beginning to live much longer, and their life expectancies are slowly approaching those seen in Western countries. By contrast, although they are living longer, the statutory retirement age is relatively low. Thus the period of life spent in retirement is relatively long.

[6] As Czech old-age pensions are tax-free, it is fairer to consider a replacement rate related to net earnings. In this case the ratio is 57%.

[7] Based on data from the end of 2002.

B) Although, according to demographic projections, the number of pensioners is supposed to begin increasing in 2006, and although the increasing statutory retirement age should have kept numbers somewhat in check, the ranks of pensioners have been growing since 1997. The cause is the continuing popularity of early retirement.

C) Even though the Czech population is very well informed about the negative effects of population ageing on the current pension system, and in spite of the fact that they know that the statutory retirement age will have to be further increased (to 63 years of age for both sexes by 2013), the overwhelming majority of the Czech public would like to retire before reaching the statutory retirement age. If their wishes were to be fulfilled, they would be further extending the period of time spent in retirement.

D) There is a tendency to take early retirement, in spite of the fact that the large majority of people in pre-retirement age know that their pensions will be much lower than their previous income and that their standard of living will drop considerably.

E) Research conducted among the elderly, however, has shown that many of those who are already retired today admit that they did not really want to retire.

These individual points will be further illustrated in the following pages.

A) Increasing life expectancy and the statutory retirement age

Since the beginning of the 1990s, Czechs have been living much longer than they did under the communist regime, and their life expectancy is slowly approaching levels typical for western countries. Today, Czech men and women live on average to the ages of 72 and 78 respectively.

The retirement age continues to be relatively low, despite the fact that the Czech Republic is one of the few transition countries experiencing an increase in life expectancy. By 1995, the statutory retirement age was 60 for men and 53–57 for women, depending on the number of children they had (childless women could retire at 57, and they could retire one year earlier for each child they had). In 1995, a gradual increase in the retirement age was initiated, so that by January 1, 2007 the retirement age will be 62 for males and 57–61 for females (again depending on the number of children they have – 61 for childless women, 60 for mothers with one child, etc.).[8]

[8] The age limit was set too low. This was partly due to the fact that, when preparing the Pension Insurance Act, the government and MPs followed an official 1993 demographic projection from the Czech Statistical Office, which failed to estimate correctly the trend in the Czech mortality rate. The authors of the projection wrongly assumed that life expectancy in 2020 would be 68.7 and 76.6 years for men and women respectively. However, owing to the dynamic development of Czech life expectancy, this estimate was surpassed in as early as

The increase in the retirement age did not follow the recommendations that were made by some demographers and sociologists, and it has been far from sufficient to make any noticeable difference.[9] Moreover, the 1995 reform did not comply with the World Bank's recommendations, issued in its seminal 1994 manual, *Averting the Old Age Crisis*, which suggested unifying the retirement age for men and women. On the contrary, the reform petrified the peculiar difference in the female retirement age, which is based on the number of children a woman has raised, 'punishing' childless women with retirement at 61 and 'rewarding' the more fertile ones with an old-age pension at 57.[10]

The current situation also runs counter to EU legislation, which means that the differences in male and female statutory retirement ages are only a temporary exception. Under EU directives age discrimination of this kind will be banned as of 2006. For this reason, the Czech government has announced plans to make the retirement age equal for men and women at the age of 63 by 2013; there have also been discussions of even raising the age to 65.[11]

The combination of a low retirement age and increasing life expectancy has far-reaching effects on life during retirement. Czechs today, as long as they reach the legal retirement age, are living much longer in retirement than before: the average is 17 years for men, and an overwhelming 23 years for women (in Western Europe the corresponding figures are 15 and 20 years respectively). Being outside the world of work for that long increases the risk that people will experience feelings of isolation, uselessness and social exclusion. As Giddens notes,

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1994 for men and in 1995 for women. The figures as of 2003 are 72.1 for men (3.4 years longer than what was projected) and 78.5 for women (1.9 years longer).

[9] The Czech government did not dare raise the retirement age dramatically, as it was afraid of the public's reaction, which, according to research in 1994, was opposed to any increase at all. Before the 1998 elections, the Social Democrats even promised that increases to the retirement age would cease and that the retirement age would return to the level it had been under the communist government. The Social Democrats won that election on their pre-election promise, which (thankfully) they subsequently forgot.

[10] In the near future, however, women with more children may not be very happy about the fact that they are supposed to retire at 57. Their shorter working career (reduced both by time devoted to caring for their kids and by earlier retirement) may contribute to a lower standard of living when they retire. The different retirement age for males and females is also problematic from the point of view of EU standards for social policy.

[11] Life expectancy, according to scholars who focus on such issues (cf. for example Ryder [1975], Uhlenberg [1987] or Day [1988]), is one of the factors from which a more or less rational model of the retirement age could be derived. These authors suggest that the retirement age should be set at such a level that would allow for a life expectancy in retirement of either 10 or 15 years. If we take the softer of the two norms – 15 years of retired life – as the standard for the Czech Republic, and analyse the mortality projections and the process of ageing for the Czech population, we arrive at the conclusion that as of 2010 the Czech retirement age should be 65 years.

> ...connection to the work process...is decisive in the fight against involuntary social exclusion. Work brings with it various kinds of benefits for a number of reasons: aside from income, it gives people the feeling of stability and a direction in life, and creates wealth for the entire society [Giddens 2001: 95].[12]

Despite this, the Czech public resists any increase in the retirement age. It was opposed to increases before the Pension Insurance Act 155/1995 was passed, and it continues to oppose it even now, when experts are once again discussing the necessity of such a move. In February 1988, 70% of the economically active Czech population aged 18–59 agreed with the opinion that the retirement age should remain unchanged.[13] Another representative survey conducted in June 1998 arrived at the same results: 73% of the Czech population were against increasing the retirement age to 65, 11% were in favour, and 16% were undecided.[14] In May 2002, in a survey of the population aged 60 and over, respondents were asked what the retirement age should be. The mean response was 55 years for women and 60 for men. Furthermore, 58% of respondents would like to see the different ages for men and women maintained, while 28% thought that it should be a matter of individual choice, and 15% said that the age should be the same for both men and women.[15] This kind of more or less uniform and persistent attitude is not surprising. Research from other countries also indicates that people generally respond to questions about retirement age by repeating the set age that currently applies.

Statutory retirement age is one matter, but actual retirement is another. In most Western European countries, where many people "race out of the workforce at the earliest affordable opportunity" (*The Economist* 2004: 13), the average age of real retirement is lower than the set retirement age, and a similar trend is being noted in the Czech Republic. This is caused by early retirement.

B) The number of pensioners has been increasing

According to population projections, the number of pensioners was supposed to begin increasing in 2006 (see Figure 2). Before that, the annual incremental increase in the statutory retirement age introduced in 1995 was expected to compensate for the predicted increase in the number of persons of retirement age.

To the surprise of all interested parties, however, the numbers of pensioners began increasing back in 1996. While in 1995 there were 1.255 million pensioners, by 2001 the figure was 1.325 million. The cause of this increase was early retirement. The current pension system allows those who have contributed to the system for at

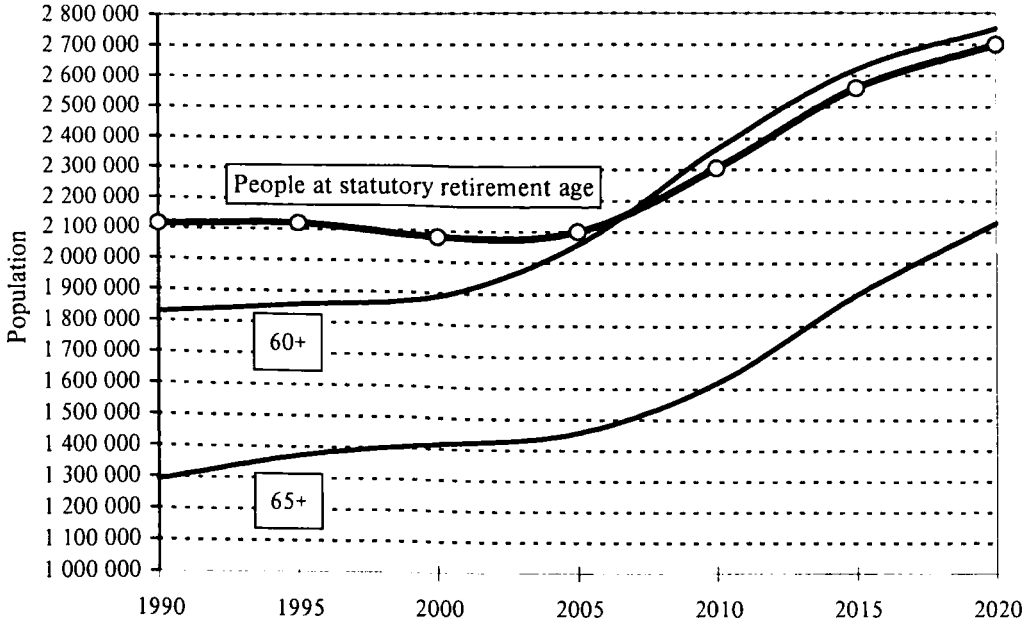
[12] Quoted from the Czech translation.

[13] *OAS* data file (see the Appendix).

[14] *LSS* data file (see the Appendix for details).

[15] *Life at Retirement* data file (see the Appendix for details).

Figure 2. Recorded and projected numbers of elderly persons aged 60+, 65+, and the projected number of old-age pensioners, Czech Republic 1990–2020



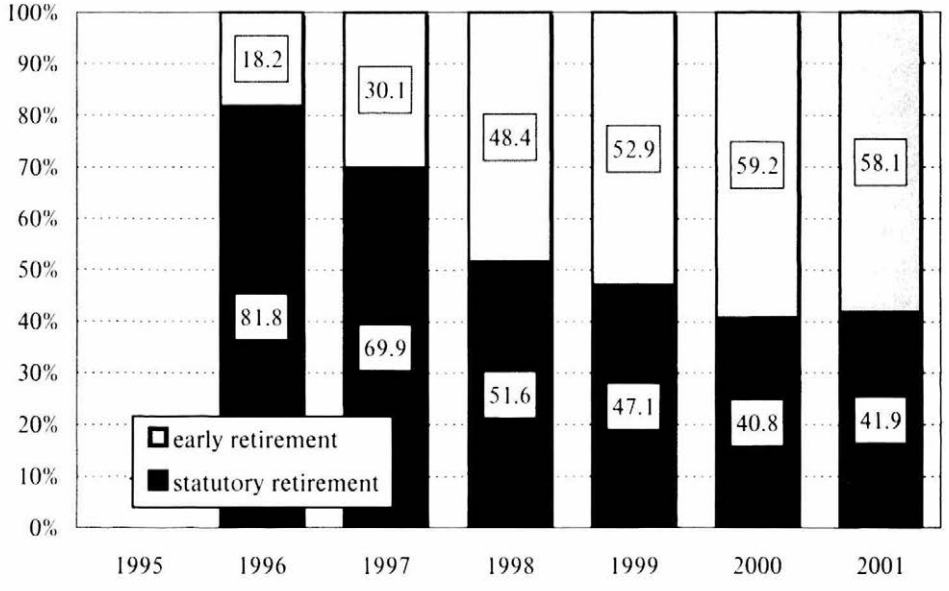
Source: Population projections by the Czech Statistical Office, 1999.

least 25 years, but younger than the set retirement age by up to three years, to take early retirement, although they then receive a reduced pension for the rest of their retirement. People up to two years younger than the retirement age who have been registered at the Labour Office as unemployed or disabled for at least 180 consecutive days, and who have prior to that contributed to the pension system for at least 25 years, can also take early retirement. They receive pensions at a reduced rate for the first two years, then, after reaching the set retirement age, they receive the full amount.[16]

Figure 3 illustrates how the practice of taking early retirement has developed since 1995. In 1996, when it first became possible to take early retirement, only 18% of new pensioners had opted for such possibility, while the figures in 2000 and 2001 were around 60%. Thus, in 2001 the average ages of men and women at the time of

[16] In order to make the information given about retirement complete, it is necessary to add that when, conversely, a person does not retire at the permitted age, there is a financial benefit in doing so. He or she will receive a slightly higher pension for each additional period of 90 days worked. At present, for every two additional years spent in paid employment, the pension increases by 1% [Klimentová 2002].

Figure 3. The share of new retirements occurring at the statutory age (%) and the share of new and early retirements (%) out of total new retirements, Czech Republic 1995–2001



Source: Czech Statistical Office

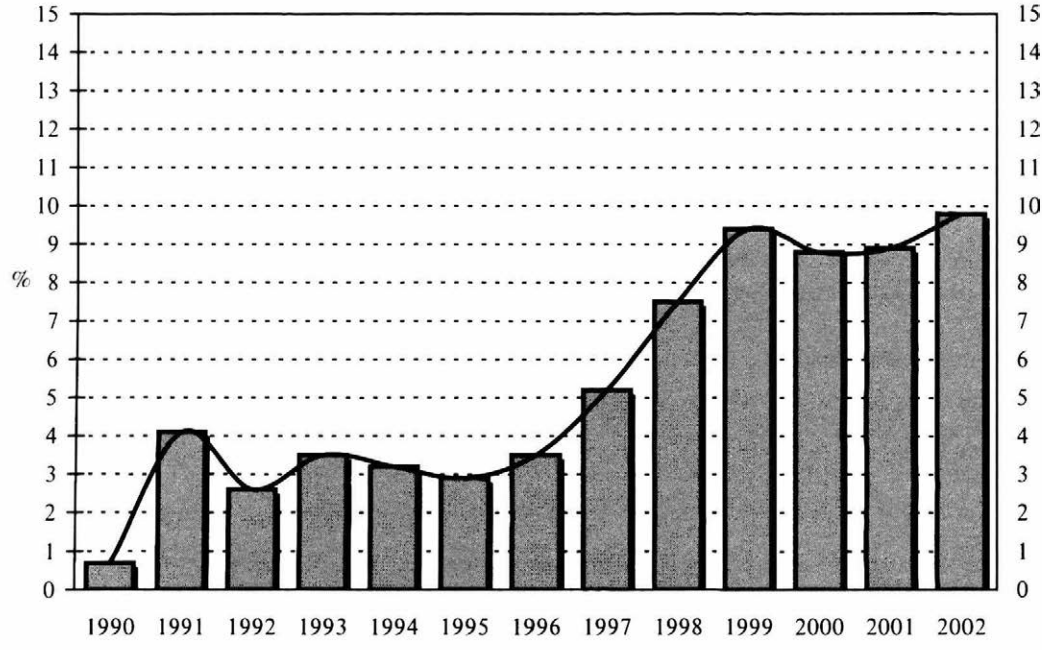
retirement were 59 and 56 respectively, which in each case is two years below the set age.

This marked increase in early retirement could not have occurred without significant macro-structural causes. Among these is the fact that people tend to "retire at the minimum age of eligibility for what they perceive to be adequate retirement benefits" [Atchley 2000: 250]. It appears that Czech must in some way perceive early retirement as beneficial. With regard to personal finances, taking early retirement seems to be a questionable decision. As many Czech economists have shown, [*Problém...* 2000] it is not entirely easy to state whether taking early retirement may or may not bring about financial benefits, or whether it depends on a combination of factors. Nonetheless, they have demonstrated that taking early retirement is beneficial for those living alone, (even more so for men than for women, and especially for those with low incomes). But in the case of two-member households, the advantageousness of taking early retirement is less clear.[17]

One of the most important reasons for taking early retirement appears to be unemployment. In 1996, unemployment rates began increasing during the transforma-

[17] The current 'maximum' decrease in the amount paid in pensions to people who take early retirement is about CZK 1130 per month. The average decrease is about CZK 915. In 2001, the average pension was CZK 6350.

Figure 4. The unemployment rate in the Czech Republic, 1990–2002 (as of December 31, 2002)



Source: Ministry of Labour and Social Affairs

tion of the Czech economy (see Figure 4),[18] and significant growth in unemployment was seen in the second half of the 1990s. During this period, legislation to enable early retirement was enacted. The coincidence of the two trends, increasing unemployment and the increasing popularity of early retirement, was not merely accidental.

It is true that with respect to older workers the age-specific unemployment rates during this period were in no way especially high (for example, in 2001 the unemployment rate among people aged 45–54 was 5.9%, but as high as 16.6% among people aged 15–24). This, however, is due in part to the fact that older unemployed persons often took early retirement. When people at that age lose their jobs (particularly those aged 55 and over) it is very difficult to find new employment, as is illustrated in Table 1, which indicates the structure of Czech unemployment in 2002 by age.

Findings presented in a special Czech report on unemployment among older workers [cf. *Problém...* 2000] show that Czech women take early retirement more fre-

[18] Low unemployment rates recorded until 1995 were on the one hand a legacy of the communist centrally planned economy, and on the other were caused by the slow process of economic transformation in the first half of the 1990s. Let us remember here that under communism everyone had to be employed (the Czechoslovak Communist Constitution included a clause about a person's 'right to work').

Table 1. The structure of unemployment (%) in 2002 (yearly averages) by age group

Age Groups	Men	Women
15–24	29.5	21.0
25–29	14.6	15.9
30–34	8.9	13.1
35–44	17.8	22.4
45–54	21.6	23.0
55 +	7.8	4.6
Total	100	100

quently than men, as do people with less education, people from the countryside, and people living near the Austrian and German borders. These data lead towards a speculative explanation that early retirement is chosen by people who have the opportunity to supplement their income by producing small products for sale or through untaxed work.[19] Research conducted among job-seekers at the Labour Offices shows that, of those who took early retirement, only one-sixth were registered as unemployed at the Labour Office. The remaining five-sixths applied for early retirement without even taking advantage of the opportunity to register and receive unemployment benefits [*Problém...* 2000]. There are also socio-cultural factors that come into play here – the social status of pensioners is much higher than that of unemployed persons.

C) Early retirement is a popular concept

The Czech public is fairly well informed on the issue of population ageing. In a 1998 survey on the problems of old age security (OAS), which was carried out on a national sample of the Czech adult population, 90% of respondents said they knew that *the population is ageing, the number of pensioners is increasing, and therefore less people are contributing to the pension system.* In another representative survey, carried out

[19] Czech legislation seriously limits the rights of pensioners to acquire supplementary earnings during the first two years of retirement (earnings above the set limit lead to a reduction in the amount paid in the pension). After the first two years, supplementary earnings are no longer restricted and the pension is not reduced.

in 1999, 80% of people aged 45 and over knew that by 2007 the retirement age in the Czech Republic will increase to 62 for men and 57–61 for women. In the same survey, 76% of respondents aged 45 and over knew that it is possible to take early retirement at a reduced pension rate [STEM 1999]. Thanks to the extensive media coverage on the current debate about pension reform, the Czech public also know that the government is considering tightening up regulations on early retirement and increasing the set retirement age from 63 to 65 years for both sexes owing to the deficit in the pension system.[20]

Similar results were also gained in research that was conducted on a representative sample of the Czech population in the autumn of 2001, as part of the extensive European project titled 'The Acceptance of Population-Related Policies (PPA-2)'.[21] In the study, among the things respondents were asked about were the questions: *'When do you expect to retire?'* and *'If you could decide, when would you like to retire?'* The results are presented in Table 2 and disaggregated for non-retired persons aged 40 and over.[22] The variables used (namely sex, highest level of completed education, gross household income, number of children, and size of place of residence) are the ones that, according to a number of studies, play the most important role in the decision to retire.

As we have already discovered, all categories of respondents expect that they will retire more of less in line with the statutory retirement age: on average, men expect to retire between the ages of 62 and 63 and women around the age of 59. The main exception is men with university education and with higher household incomes. They expect to retire after age 64; women from the same category expect to retire after age 60 or 61.

From my point of view, however, the information on the preferred retirement age is more important than the expected retirement age. The main finding here is clear: men and women would both like to retire much earlier than they expect to. This of course is not good news in connection with the essential change to the statutory retirement age that is being considered. On average, men would like to retire around the age of 59 and women at 55.6 years. The average difference between the preferred and the expected age is -3.3 years for men and -3.4 years for women. Men

[20] The administration of the public pension fund is not autonomous, and income from pension insurance is still part of the state budget. However, in 1996 a special account for pension insurance was set up in which the difference between the income from premiums and expenditures is to be kept. The balance was positive until 1997, but there has been a deficit ever since. In 1998 the deficit amounted to about CZK 10 billion; by 2001 it had increased to 19 billion.

[21] PPA-2 data file (see Appendix for details). Although the whole project is a comparative one, at the time of writing this paper it was still in its early stages, so only data for the Czech Republic is available as yet.

[22] In spite of the fact that there are data for the entire sample, i.e. all persons aged 18 and over, the responses given by younger persons (up to the age of 40) with regard to their preferred retirement age are considered irrelevant for the purposes of this paper.

Table 2: Expected and preferred age of retirement for men and women, by age group, education, and gross household income – a sample of economically active persons aged 40 and over (Czech Republic 2001)

Group of respondents:	Expected age at retirement		Preferred age at retirement		Preferred minus expected age	
	Men	Women	Men	Women	Men	Women
Age						
40–49	62.5	59.5	59.0	55.4	–3.5	–4.1
50–54	62.4	58.5	59.1	54.8	–3.3	–3.7
55+	62.2	57.8	59.2	57.2	–3.0	–0.6
Education						
Elementary	61.4	59.6	58.6	54.3	–2.8	–5.3
Vocational school	62.1	58.6	58.9	55.2	–3.2	–3.4
Secondary school	62.5	59.0	58.8	55.9	–3.7	–3.1
Tertiary/university	64.2	58.9	60.6	57.3	–3.6	–1.6
Gross household income (CZK)						
Low (do 12 000)	61.6	57.7	58.3	55.2	–3.3	–2.5
Low to average (12 000–20 000)	61.7	59.7	58.1	55.7	–3.6	–4.0
Average to higher (20 001–27 000)	63.1	58.8	59.8	55.9	–3.3	–2.9
Higher (more than 27 000)	64.3	58.4	61.2	55.3	–3.1	–3.1
Number of children						
No children	61.1	57.3	57.7	52.0	-3.4	-5.3
1 child	63.1	59.2	60.4	56.5	-2.7	-2.7
2 children	62.4	59.3	58.5	56.1	-3.9	-3.2
3 or more children	62.0	58.1	59.2	54.5	-2.8	–3.6
Place of residence						
Small to medium	62.1	58.7	58.2	55.4	–3.9	–3.3
Larger and city	62.7	59.2	59.9	55.9	–2.8	–3.3
Total sample (N = 365)	62.4	59.0	59.1	55.6	–3.3	–3.4

Source: *PPA-2* data set

with university education, one child, and the highest household income want to work the longest. Among women, those wishing to work the longest are those approaching retirement age, with university education, and with one child.[23] The dif-

[23] Similar results were obtained using logistic regression, where the preferred retirement age was dichotomised as 0=early retirement and 1=later retirement. However, the results had one deficiency: the odds ratios were found to be statistically insignificant.

ference in preferred retirement age with respect to the size of the respondent's place of residence was not surprising. People living in smaller villages, where residents often also maintain small agricultural plots, want to retire earlier and do so in order to devote themselves to agricultural activity. The preferred retirement age was not higher than the expected retirement age in any category.

These findings are not a good sign for the active ageing policy of the Czech government. Active ageing is the concept that the European Commission [1999] wants to employ in order to face the challenges of demographic ageing. European policy-makers have begun to argue in favour of a more broadly based policy approach. Rather than relying on either conventional welfare state institutions or market incentives, they have called for a more comprehensive policy agenda that would increase labour force participation among older people. However, in order to achieve this goal it is necessary not only to encourage older people to remain in employment longer, but, at the same time, to encourage employers to retain and recruit older people [Taqi 2002].

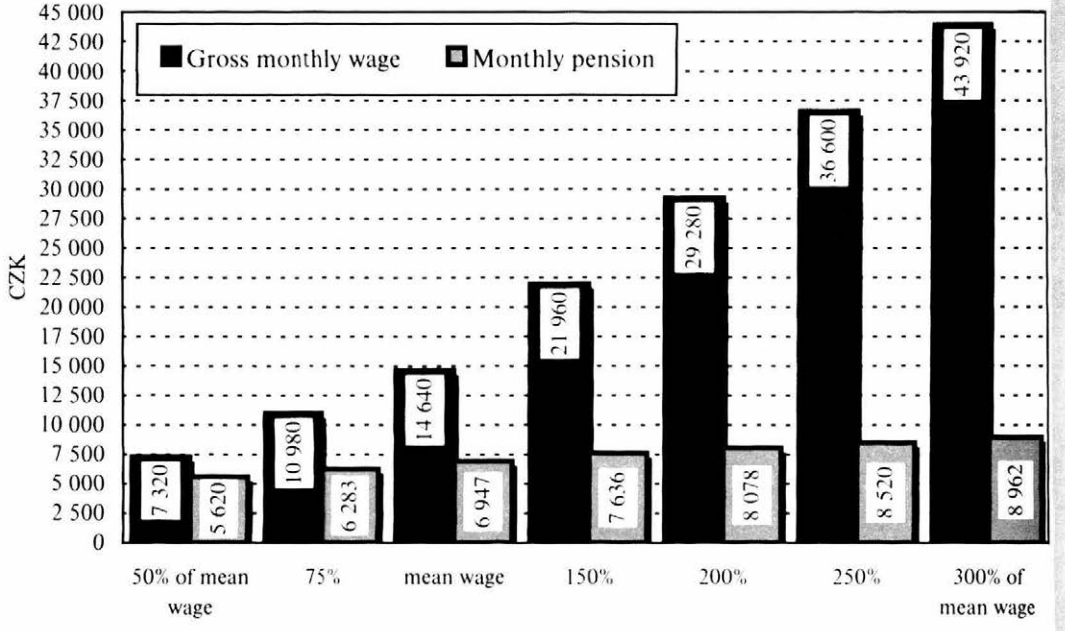
D) Pensions offer much less money than the last pre-retirement income does

Literature on retirement maintains that the decision to retire is related to the financial incentives offered by the labour market and the pension system. It is to be expected that a person's decision to retire or not is based upon a rational choice: a comparison of one's expected financial needs in retirement with expected financial resources. But people also compare how satisfied they are in their current employment with how satisfied they expect to be in retirement. In the event that satisfaction in the latter case is expected to be higher, a person may decide to make a trade-off between being more satisfied and having a lower level of pension income [Atchley 2000].

In the case of Czech pensioners, it is not possible to talk about rational choice. Many older people maintain that retirement leads to poverty, and from research that has been conducted on poverty among the elderly this appears to be true. They regard themselves as being poor – according to surveys on subjective poverty during the second half of the 1990s, 30–50% of the elderly classified themselves as such [Rabušic 1998]. Furthermore, public opinion research tells us that a large part of the non-elderly Czech population also believes that the elderly are poor. Their opinions are primarily based on knowledge of the fact that the Czech pension is very low in relation to last incomes before retirement. In 1999, 68% of the Czech population over the age of 45 were aware of the fact that the average pension is around CZK 6000 per month [STEM 1999].

Although objective poverty among the Czech elderly is not as serious [Rabušic 1998] as the subjective assessment might indicate, the amount of a pension payment is indeed quite low. Among the Czech pension system's serious drawbacks is the fact that retirement benefits are still very much levelled off and the extent of re-

Figure 5. The relationship between gross monthly wages and pensions in the Czech pension system, according to earnings (model calculations for a person who retired in 2002)



distribution from the rich to the poor is considerable (see Figure 5). This continues to be the case despite the proclaimed introduction of the principles of actuarial mathematics, which should tie the level of individual retirement benefits to a recipient's actual earnings and to total individual premiums, thus reducing the extent of solidarity.

If the relation between wages and pensions is expressed in percentages, then, for example, a person who during the years relevant for pension calculation earned about 50% of the average income would receive a monthly pension of about 77% of his/her previous income. On the other hand, someone whose income was equal to the average income would receive a pension of about 47% of his/her previous income. The figure drops to a mere 27% for those who previously had twice the average income, and to just 20% for those who had three times the average income. Thus, for a substantial part of the Czech population the decline in the standard of living is an unavoidable fact, and it is even more so for those opting for early retirement.[24]

Data from the 'PPA-2' study showed that the economically active parts of the Czech population are aware of this fact. The opinions that respondents gave when

[24] Note, moreover, that the old age pension is the sole source of income for most of the elderly.

Table 3. What will men and women miss most when they retire from the world of work – by age (columns %, *N*=904, economically active)

	Men			Women		
	18–34	35–54	55+	18–34	35–54	55+
The financial difference between their salary and pension	48	59	58	44	56	47
The feeling of usefulness	20	17	24	30	23	28
Contacts with colleagues	22	13	8	17	13	15
I will no longer be occupied by commitments	9	9	9	7	7	8
Contacts with customers or partners	1	1	1	2	1	2

Source: *PPA-2* data set

asked what they thought they would miss from the world of work when they retired are presented in Table 3.

Clearly the financial element is the most important factor. Both men and women (in all age groups) are aware that after retiring their financial situation will change. Interestingly, this feeling is more intense among men (especially at 55+ age group) than among women. The second most frequently indicated element that people believe they will miss after retirement is the feeling of usefulness – a view more intensely held by females than males.

Generally speaking, all this information indicates that the Czechs are well informed about one of the greatest problems of the Czech pension system: the high level of redistribution and the weak connection between the level of payments into the system and the *replacement rate* (the relationship between the amount paid into the system and the amount later received). Knowing this, however, the key question to be asked is why do so many Czechs look forward to and rush into retirement when they are aware of its implications? Speculative causes of this situation will be discussed later.

E) Many people who have already retired confess that they did not really want to retire

As has been shown here, Czechs exhibit an overwhelming desire to retire much earlier than the statutory retirement age. But it is also important to look at people who have already retired and have been retired for a certain period of time and ask what their view of (their) retirement is. The very act of retiring might not always be voluntary. Some people retire willingly, but others may be more or less coerced into taking a 'well-earned rest' against their will, and still others are forced to retire for health reasons. A partial answer to such a question is available for the Czech population, as two surveys dealt with this problem in 1996 and 2002, in which respondents were asked what their feelings and sentiments were when they retired (see Table 5).

Table 5. Feelings upon retirement – by gender, in 1996 and 2002 (%)

Feelings upon retirement	1996			2002		
	Male	Female	Total	Male	Female	Total
I was glad to retire	39	45	42	39	42	41
I retired with hesitation	24	27	26	30	29	29
I did not want to retire but I had to for health reasons	16	14	15	10	9	9
I did not want to retire but my company did not need me any longer	21	13	16	18	16	17
I did not want to retire but I had to for family reasons	–	–	–	3	4	4

Source: *50+* data set [1996]; *Life at Retirement* data set [2002]

On the whole, both in 1996 and 2002, only about 40% of respondents retired without any hesitation and about one-quarter retired with some doubts. This means that, in 1996, 31% of respondents did not want to retire but had to because of either health reasons or redundancies. In 2002 the proportion of those who had to retire for these reasons (or, in the 2002 survey only, for family reasons) remained more or less the same (30%). There were no pronounced differences between men's and women's responses in either survey, though in 1996 men slightly more frequently said that they had to retire due to redundancies. Clearly, in the Czech Republic the act of retiring is associated with a number of different considerations, and there is a large part of the population that does not take a pleasant view of retirement.

A clear-cut difference between people's feelings did however appear in connection with respondents' gender and education (see Table 6). Men and women with higher education, in contrast to those with lower levels of education, were significantly less happy about retiring in both 1996 and 2002. It is worth noting that educated men and women more often indicated that they had retired because their company no longer needed them. This finding should be regarded as quite alarming.

The findings about people's feelings upon retirement are important with regard to the concept of active ageing. They indicate that right before retiring many people feel unsure about doing so. If it were possible to convince the labour market that older people are an asset, then it would be much easier to eliminate the barriers faced by elderly persons in finding employment or even keeping their existing jobs. As a result, it would then be possible to decrease the rate of early retirements, and increase the participation rate of those over the age of sixty.

However, the problem is that, as Table 7 illustrates, the non-pensioner population has not really accepted in their minds the concept of active ageing, the concept of staying in the world of work longer and beyond the statutory age of retirement.

Table 6. Feelings upon retiring – by gender and education, in 1996 and 2002 (%)

Feelings at retirement	1996				2002			
	Education				Education			
	Male		Female		Male		Female	
	Lower	Higher	Lower	Higher	Lower	Higher	Lower	Higher
I was happy to retire	41	33	46	38	43	33	46	35
I retired with hesitation	25	23	26	37	26	36	28	30
I did not want to retire but I had to for health reasons	17	15	16	7	12	7	10	7
I did not want to retire but my company did not need me any longer	18	30	12	19	17	19	13	22
I did not want to retire but I had to for family reasons*	-	-	-	-	2	4	4	6

* This item was not included in the 1996 survey

Source: *50+* data set (1996); *Life at Retirement* data set (2002)

Only 31% of respondents wish to continue working even after reaching the statutory retirement age. However, one already ascertained fact is highlighted again: The people approaching retirement age begin to think about actually retiring, and many would rather delay it. Of those aged 55 and over 44% would like to remain in employment as long as possible, which is 13% more than in the total population.

However, hesitations about retiring do not mean that today's Czech pensioners are in any way markedly dissatisfied with their situation. According to data from research conducted among the elderly in 2002 (*Life at Retirement*), 84% of pensioners expressed overall satisfaction with their lives. The effects of retiring did not play a traumatising role: 32% maintained that retiring had a pleasant impact on their overall satisfaction with life, and 52% were convinced that retiring had no impact on their level of satisfaction with life.

4. Why are they all so eager to retire?

The preceding pages have attempted to illustrate the paradox of the transition to retirement. The non-elderly Czech population today knows that there is a chance they will live for many years after retirement, and that their income will fall once they have retired, along with their standard of living. In spite of this, they do not want any increase in the statutory retirement age, and would even like to retire earlier whenever possible. But a substantial number of pensioners have confessed that, just before deciding to retire, they had serious reservations, and that if conditions at work had been favourable, and health permitting, they would not have left their jobs at that point.

Table 7. Responses to the question: ***Some people maintain that a healthy person of retirement age should remain in employment as long as possible, so as to maintain vitality and not lose contact with people. Others say that, upon reaching retirement age, a person should leave employment so that they can enjoy retirement while they are not yet too old or too ill. Which of these opinions do you agree with more?*** **(% of those who agree)**

	All respondents	Economically active	Age 45+	Age 55+
Continue working as long as possible	31%	36%	35%	44%
Leave work and enjoy retirement	69%	64%	65%	56%

Source: STEM, *Early Retirement, General Population Research* [1999]

In light of these findings, it is necessary to ask why the majority of the Czech population would like to retire at an age when, from the point of view of the life cycle, they are not yet old enough to be considered elderly. The existing Czech research unfortunately does not make it possible to formulate a direct answer, but some hypotheses can be made.[25]

One possible answer could be sought in 'path dependency', i.e. the legacy of the communist period, not yet in the distant past. During communism the world of work was not really a world of work. Private enterprises did not exist; all workshops, factories, offices, shops, schools, businesses, companies and hospitals were state owned. In them, efficiency was not important, but loyalty to the system was. Success was not rewarded with higher salaries, nor was education, creativity, or initiative. Instead, ideological conformity was praised and rewarded.[26] Salaries were fairly equal, and not even the demonstration of great efficiency would lead someone to a higher-than-average standard of living. The world of work was replaced by the world of meetings, ideological schooling, and the omnipresence of 'Big Brother' keeping watch on us. Work and performance was not valued. As a result, everyone used to rush home from work at the end of the day, and on Fridays many used to leave their places of work as early as noon to go to their cottages, thus fleeing to their private world of home improvements, do-it-yourself and moon-lighting.

As work was not valued, the mentality of retiring as soon as possible could progress, aided along by the somewhat poor health status of the population (in 1980 life expectancy was a mere 67 years for men, partly due to the high death rate among men in the 40–60 age group). The stereotype of employment as something to be loathed and disengaged from has survived in the popular imagination. It is a part of the social transformation and change in society that Czechs are slowly becoming accustomed to taking their work quite seriously and appreciating it.

[25] In our opinion this is such a serious problem that it warrants special qualitative research.
[26] A popular dictum from that period was: *We pretend to work and they pretend to pay us.*

The second explanation may be of a psychological nature. It appears that Czechs maintain a view of retirement as a fascinating time: 'sweet times doing nothing' and 'enjoying oneself', finally having time for neglected hobbies, looking after grandchildren or other members of the extended family, and even – let's face it – finding un-taxed employment in the grey economy. Therefore, if middle-aged respondents are asked in surveys their opinion on the retirement age, they are most likely influenced by their current situation (plenty of interests, over-burdened at work, or doing work they find uninteresting), and they may thus say to themselves: *Yes, it would be great if I could retire early; I would finally have time for my interests... There are so many things I could do!* Naturally, for someone in this mood, early retirement seems relatively attractive.

These respondents probably cannot imagine that they may have different inclinations and images of their life style once they approach retirement age. At that point they might begin to fully comprehend just how many social contacts work provides them with, and how work adds structure and sense to the daily routine. They might begin to realise that work provides them with far greater financial means than a pension would. Furthermore, they may become aware of the significant change in social status entailed in moving from the position of being 'economically active' to another position, that of 'pensioner'.

If the path-dependency explanation is true, then the conclusion could be drawn that it will only be a matter of time until attitudes toward early retirement change. However, this conclusion has one serious drawback. The retirement mentality is not just a feature of the socialist labour market. In many EU countries the average age at retirement is also lower than the statutory retirement age, indicating the strong popularity that early retirement enjoys. The European Commission has even blamed early retirement schemes for the slow progress made in reaching a targeted employment rate for people in the 55–64 age group (50% by 2010) and in raising the average age of exit from the labour market by 5 years, also by 2010, both of which goals were established at the Stockholm and Barcelona summits in 2001 and 2002.

On the other hand, if the psychological explanation is true, then we may question the validity and reliability of all the data on early retirement from non-senior populations.

5. Discussion

As a part of the effort to avert the negative economic impact of population ageing the Czech government is beginning to consider ways of motivating people to retire as late as possible. The results of the information that has been put together here give off contradictory signals: the middle-aged population (around 45 years of age) does oppose changes, but the population approaching retirement age may be in favour of change. Of course, the big question remains as to what Czech politicians

should do with these facts, as they are faced with the pressing task of dealing with the problems of the pension system. They are well aware that the public, with its values and attitudes, is a powerful player in shaping the development of public and social policies in a democratic society (*Vox populi, vox Dei*). As, for instance, Wayne Parsons has argued:

> "Public opinion is to the political market what consumer demand is to the economic market. In a democracy, one could argue that public policy is a function of public opinion. Policy demand determines policy supply." [Parsons 1995: 110]

The successful implementation of a social policy programme is thus often conditional upon respecting public opinion.

On the other hand, competent politicians do not always have to follow the *vox populi* blindly. If they have a strong project and can envision the suggested programme bringing long-term objective benefits to society, they have a duty to try to present this programme and argue keenly in order to convince the public and at times they must even be capable of introducing a programme that goes against public opinion. This is the simple political principle contemporary Czech politicians should follow. Pension reform is a very sensitive political issue, and, as various European opinion poll data have demonstrated, there is no public in any country that is happy when the conditions for retirement are made stricter with tougher policy measures.

Analyses of the Czech welfare system (see, for example, Večerník [1999] or Rabušic and Sirovátka [1999]) have indicated that the Czech public's welfare policy preferences are determined more by subjective than objective factors. Therefore, it can be assumed that more informative explanations coming from politicians as to why particular measures are being adopted and how they can contribute to long-term economic prosperity could increase public support for effective solutions [Večerník 1999]. But if the public is not adequately informed, and therefore not sufficiently 'competent' to understand current political decisions and debates, then one can legitimately ask: to what extent should its attitudes be binding for politicians?

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Appendix

Five data sets were explored in this paper:

1. *50+*. The authors of this survey were Ladislav Rabušic and Petr Mareš; the data were collected in November 1996 from a national representative sample by the Public Opinion Institute of the Czech Statistical Office in Prague (IVVM). 1302 answers from respondents aged 50 and older were recorded using the quota sampling procedure. The data set can be obtained from the author of this paper.
2. *Life at Retirement* (Život ve stáří), May 2002, N= 1,036, carried out by STEM with a quota sample of respondents aged 60 and older; the authors of the survey are Věra Kuchařová, Ladislav Rabušic and Lucie Vidovičová
3. *OAS*. The survey on *Old Age Security* was carried out by the Research Institute of the Ministry of Labour and Social Affairs in Prague, under the auspices of a Consensus/Phare project entitled 'Supplementary Forms of Security for the Old Age Period'. Using probability sampling, 2214 interviews were collected from the population aged 18 and older by the research agency STEM in February 1998. The data are stored at the Research Institute in Prague.
4. *PPA-2*. This is the survey on Population Policy Acceptance II, carried out in autumn 2001 on a probability sample of the Czech population aged 18 and older. It is a part of and a sequel to a European comparative study on the perception of population trends and related population policies. The first wave of the study was carried out in the countries of Western and Eastern Europe in 1990–1991 (see, for example, Moors and Palomba [1995]).

43. *LSS*. The authors of this survey on the *Legitimacy of Social Security* are Ladislav Rabušic and Tomáš Sirovátka. The survey was carried out in June 1998 by the Public Opinion Institute of the Czech Statistical Office in Prague (IVVM) using a national representative sample (quota sampling procedure) of 1351 respondents. Data can be obtained from the author of this paper.

Post-Fordist Capitalism in the Czech Republic: The Investment of Flextronics in Brno

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Abstract: Drawing on the author's case study of one 'unsuccessful' attempt of the Czech Republic and Brno to lure foreign capital to the city of Brno, this article attempts to provide incentives for rethinking the theories of post-Fordism in order to theorise about the particular, local articulation of capitalism(s) in East Central Europe. The author presents selected findings from the case study with the intention of introducing and demonstrating the utility of the form-analytic, strategic-relational approach and some of the post-Fordist theories in analysing capitalism and socio-economic governance in the Czech Republic. He draws on the case of the subsidised investment in the Brno region by the transnational corporation Flextronics in 2000–2003. The company left the locality after approximately two years, an unprecedented occurrence in the Czech Republic, which resulted in some political upheaval. The author focuses on the interaction between the investor and the state and other bodies of socio-economic governance and argues that the story of Flextronics is indicative of some of the post-Fordist transformations in capitalism and capitalist governance. Further, the author also draws some conclusions with regard to the relations between company, state, and municipality in the post-Fordist environment in the Czech Republic.
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1. Introduction

The states and societies of East Central Europe (ECE) joined the world capitalist system at a time when the system itself was struggling with a number of dilemmas and was confronted with new problems and challenges. This article deals with some of the relatively new trends in world capitalism from the ECE perspective. It presents selected findings of a case study I made of the transnational corporation (TNC) Flextronics' subsidised investment in the Brno region in 2000–2003. The company left the locality after approximately two years, an unprecedented occurrence in the Czech Republic, which caused some political upheaval. This article focuses on the interaction between the TNC and the state and other bodies of socio-economic governance.[1]

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[1] See, e.g, Pavlínek [1998] and Pavlínek and Smith [1998] for a discussion of the role of foreign direct investment in the Czech post-communist transformation.

The aims of this article are quite limited. Alongside introducing selected empirical findings from the case study, I would also like to demonstrate the utility of the form-analytic, strategic-relational approach in analysing socio-economic governance in the Czech Republic and show the relevance of some concepts contained in the theories of post-Fordism in the context of ECE. The study should provide incentives for rethinking the theories of post-Fordism in order to theorise about the particular, local articulation of capitalism in the region. I would like to emphasise that this study does not attempt to theorise about Czech capitalism as such.

First, I will briefly outline my theoretical perspective and employ it to depict current transformations of capitalism and the socio-economic governance of capitalism. Second, I will outline some methodological remarks and caveats for this inquiry. Finally, I will present selected findings from my case study of Flextronics' investment in Brno by utilising some concepts of the form-analytic, strategic-relational approach and the theories of post-Fordism.

The story of Flextronics' investment will be interpreted as a post-Fordist type of interaction between the economic and the political systems. The efforts of the city and the state to attract Flextronics to the locality with investment incentives and the ensuing state-city-TNC interaction will be described as post-Fordist socio-economic governance. The scalar dimension of the interaction demonstrates the transformation of the political system in the process of scale relativisation.

The region and the TNC are in complexly dialectic relation to one another. There is no one-way dependence of the region on the TNC or vice versa. However, the region is in a disadvantageous position in relation to the TNC. The power of the TNC is based on the (imagined) competition between localities to attract investors. The activities of regions are continuously evaluated by investors (TNCs), which are able to reward and/or punish localities. In addition, the TNC's power is based on a situation in which the TNC is a source of uncertainty for the locality.

I conclude that the analysis of the Flextronics story supports the thesis that current spatio-temporal transformations reinforce the potential of the economic system to achieve ecological dominance – that is, to enforce its logic on other systems. The capacity to distantiate and compress time-space enabled Flextronics to escape the control capacities of the locality or nation-state. The power relation between the TNC and the locality is unequal to the region's disadvantage. In addition, it is possible to observe the semantic dominance of the economic system. The economic dominance is reflected in the language and logic that public decision-makers use to grasp social reality and in their semantic representation of the world economy.

2. The theoretical perspective

2.1 The form-analytic, strategic-relational approach

In the study I draw on the form-analytic, strategic-relational approach developed by Bob Jessop [1990; 2002a]. This paradigm integrates (1) the regulation approach to the political economy of capitalism, (2) the political economy of state and politics inspired by Gramsci and Poulantzas, (3) critical discourse analysis, and (4) system-theoretical insights into autopoiesis and governance. These approaches are complementary, since the first three assume critical-realist ontology, epistemology, and methodology [e.g. Sayer 2000], and the remaining, constructivist autopoieticist theories can be re-contextualised and articulated into the critical-realist paradigm.

The regulation approach rejects the existence of an ahistorically delimited and disembedded sphere of economic relations tending towards equilibrium [see, e.g., Boyer 1990; Boyer and Saillard 2002; Jessop 1990, 1995]. Market forces are viewed as one of many factors contributing to capitalist expansion. Regulationists also reject the argument that the optimising behaviour of inherently rational individuals drives exchange. Instead, the economy is understood as historically specific, socially regularised and embedded with actors that are governed by historically specific economic norms and modes of calculation. Continued capital accumulation without extra-economic support is considered improbable owing to the crisis tendencies inherent to capital relations. Capitalism is analysed very broadly as an ensemble of institutions, organisations, actions, and social forces organised around the reproduction of capital as a social relation. This ensemble acquires structural coherence as a specific 'social fix', which helps to secure, partially and provisionally, the reproduction of capitalist relations and achieves the unstable equilibria of compromise.

The political economy of state and politics inspired by Gramsci [1971] and Poulantzas [1978] which understands state power to be the power relation that is mediated through the state's institutional ensemble. State power is not exercised by the state as such, but depends on the balance of forces within society and state apparatuses. The correspondence between the different social practices that bring social forces and institutions into compliance with the requirements of capitalist reproduction (i.e. the historic bloc) may be secured by contingent and historically specific hegemonic leadership. Intellectuals who develop alternative strategies and hegemonic visions play a key role in exercising hegemony and in the construction of the historic bloc.

Critical discourse analysis contributes to the form-analytic, strategic-relational approach through its emphasis on the contribution of discourse to the construction of the capitalist economy, state, and historic bloc [see, e.g., Chouliaraki and Fairclough 1992, 1995; Fairclough, Jessop and Sayer 2003]. Nevertheless, emphasis on the discursive moment of capitalism does not imply that capitalism is constructed purely discursively or that it lacks any institutional materiality.

The theories of self-organisation provide useful insights into the relations between mutually dependent societal systems with their own logic, organisational

principles, institutional dynamics and operational codes. Moreover, they offer theories on the relations between systems and the lifeworld. For instance, these theories produced the concept of ecological dominance, which refers to the capacity of a system to enforce its logic on other systems.

In sum, the form-analytic, strategic-relational approach views capitalist modernity from the perspective of reciprocally interdependent autopoietic societal systems. These sub-systems are structurally coupled with each other and with their environment in the process of co-evolution. Based on a Marxist analysis of contradictions in the commodity form, the self-reproduction of the capitalist economy is deemed improbable. Therefore, the capitalist economy is asymmetrically dependent on other systems, which compensate for the constitutive incompleteness of the capital relation in the real world and temporarily manage fundamental contradictions in the commodity form. Therefore, the co-evolution of societal sub-systems also involves imposing the spatio-temporal fix (or 'social fix') on the economic system.

> Reproducing and regularizing capitalism involves a 'social fix' that [...] gives it [capital relation] a specific dynamic through the articulation of its economic and extra-economic elements. This helps to secure a relatively durable pattern of structural coherence in the handling of the contradictions and dilemmas inherent in the capital relation. One necessary aspect of this social fix is the imposition of a 'spatio-temporal fix' on these economic and extra-economic elements. It achieves this by establishing spatial and temporal boundaries within which the relative structural coherence is secured and by externalising certain costs of securing this coherence beyond these boundaries. [Jessop 2000a: 334–335]

Thus, the history of capitalism is viewed as a succession of more or less effective implementations of accumulation strategies that temporarily and partially resolve or displace capital-relation contradictions.

2.2 *Recent transformations of capitalism*

In the paradigm I employ, the current stage of capitalism is interpreted as a crisis of the Fordist, national, spatio-temporal fix of the economy and polity, which was institutionalised through the advances made by capitalist societies after the Second World War [Jessop 1994; 2000a; 2000b; 2002a; 2002b]. The Fordist social fix was based on a cycle of mass production and mass consumption. This virtuous cycle rested on a congruence of national economy, national state, national citizenship, and national society.

The undermining of the nation-state containers of social and economic processes is one of the main factors that caused the crisis of the Fordist social fix. Economic internationalisation undermined the national economy as the object of economic management. The era of effective national economies and related state

policies is over, as the nation state, national economy and national society are no longer congruent. This shift has rendered Fordist economic and social governance infeasible. It has led to a different conception of the economy. The object of economic management is no longer the nationally demarcated cycle of mass consumption and production, but rather the knowledge-driven network economy in an environment of globalisation. Success in the new economy depends on the position of economic units in the network. Accordingly, the dynamics of growth in a locality depend on its integration into the global division of labour. Therefore, state managers are concerned primarily with the economic competitiveness of a place and, consequently, with supply-side intervention [cf. Beck 2000a; Castells 1996; Cerny 1995; Jessop 2000a; Reich 1991; and others].[2]

The key aspect of the current changes is the 'relativisation of scale'. The national scale of economic and political action has lost its primacy. National economies have become unmanageable using traditional methods of intervention and they have come to be more liable to crisis. With the primacy of the national scale, the nested relation between local regional and national scales has been disrupted. The process of scale relativisation, however, has not produced a homogenised global space of (not just) economic activity. It has involved both the re-ordering of scales and the emergence of new ones. However, no one scale has become dominant.

According to Jessop, the state and the political system are undergoing reorganisation towards a new regulatory framework.[3] In the process of scale relativisation the powers in the political system are de-territorialised and re-territorialised – the powers located at the national level are transformed upwards (supra-regional or international level), downwards (local level), and sideways (cross-national alliances). Furthermore, there is a dialectic process of re-statisation and de-statisation – in which private and public responsibilities are redefined. Also, the division of labour and the boundaries between the economic and political systems in securing the reproduction or regulation of the capital relation are transformed (e.g. into a public-private partnership). Moreover, the nested hierarchy of state power are being re-ordered.

Jessop [2002b] has introduced an ideal-typical model of the 'Schumpeterian workfare post-national regime' (SWPR) – a model of welfare governance that substitutes for the Keynesian welfare national state. First, the Keynesian intervention is replaced by a Schumpeterian one. Its aim is to strengthen the competitiveness (entailing the promotion of flexibility and permanent innovation) of a place in relatively open economies by means of supply-side intervention. Thus, public officials enhance the competitiveness of the territory and the population through investment incentives, investing in infrastructure and education. They also employ dependency management by discriminating among different investors on the basis of their ability to contribute to local development (technology transfers, links to local sup-

[2] For a counter argument to this thesis see, e.g., Hirst and Thompson [1999].

[3] Tickell and Peck [1995] oppose the emergence of the post-Fordist social fix on the grounds of regulation theory. They assert that there is currently a lack of any regulatory framework.

pliers, industrial upgrading). Second, SWPR can be described as a workfare regime, as it subordinates social policy to the demands of labour market flexibility and competitiveness. Thus it provides social services that benefit business and downgrade individual needs to a secondary position (e.g. the downward pressure on the social wage as a cost of international production). Third, with the increased significance of non-national scales of political action in the process of de-territorialisation, re-territorialisation, re-statisation, de-statisation, etc., one must speak not of a national but rather of a *post-national* regime. Finally, it does not take the form of a regime, since increased significance lies with the non-state mechanism of compensating for market failures (e.g. public-private and private-private networks).

In so far as the economic system is concerned, TNCs are often considered the principal actors in the post-Fordist situation and they have a key role in shaping local economies and societies. They owe their power to the fact that they are the central organisers of the world's production [cf. Strange 1996; Ostry 1990; Dicken 1994, 1997]. In Beck's view [2000b] the basis of the power of the TNCs lies in the following factors: First, TNCs are able to export jobs to 'cheap places' – i.e. to parts of the world where the cost of labour and workplace obligations are lowest. Second, global proximity (time-space compression and distantiation) enables TNCs to organise the production of goods and services through a division of labour in different parts of the world. National products and labels are therefore just illusions. Third, TNCs are in a position to 'play off' countries or locations against one another, as states are structurally dependent on mobile capital, while the TNCs have the freedom to choose the most favourable place of investment and production. "What is novel and decisive is not that [...] transnational corporations are growing in number and diversity, but that, in the course of globalization, they are placed in a position to play off national states against one another" [Beck 2000b: 65]. In the process of 'global horse-trading' they are able to find the cheapest fiscal conditions and the most favourable infrastructure. Moreover, they can 'punish' countries that they find unfriendly and/or expensive by withdrawing or not carrying through the investment. In this way they have the power to withdraw material resources such as capital, taxes, and jobs from society. Fourth, because of the distantiation of production, they themselves can choose their investment site, production site, taxation site and residential site. Again, the TNCs are able to 'play off' these sites against one another. As a result, they can produce in a locality with the lowest production costs and social standards and pay taxes where they are lowest, and their managers can live where it is nicest.

According to Bauman [1998a, 1998b], the power of capital is an example of Crozier's domination strategy. Michel Crozier asserted that to rule means to be a source of uncertainty in relation to the dominated. In the 'new world order', world finance, capital, the market and its actors are the focus and source of uncertainty for states. The former possess the freedom to manoeuvre, while states are exposed to the constraints which are produced by the decisions of the dominated side. Currently, freedoms and constraints have been redistributed in a manner that results in the concentration of freedom to act in the economic sphere.

In system-theoretical terms, the current spatio-temporal transformations reinforce the potential of the economic system to achieve ecological dominance. The concept of ecological dominance refers to the potential or capacity of an operationally autonomous system to enforce its logic on other systems, structurally coupled, to an extent greater than the capacity of these systems to impose their logic on the former.[4] The ecological dominance of a system is only relative and contingent and does not exclude relations of reciprocal influence, resistence and dependence of the dominant system an other systems. The processes of globalisation, and especially the neo-liberal policies connected to them, reinforce the relative ecological dominance of the capitalist economy, as they release its degrees of freedom, its opportunities for self-reorganisation, its scope for time-space distantiation and compression, its externalisation of problems and its hegemonic capacities from confinement within limited ecological spaces policed by another system (e.g. nation states). Thus, the ecological dominance of the economy is based on the abilities of economic actors to distantiate and/or to compress time-space and consequently escape the control capacities of most political forces [Jessop 2000a]. Jessop discerns five trends that strengthen the ecological dominance of contemporary capitalist economy. First, there is an increase in the complexity of circuits of capital and an increase in flexibility in its response to perturbations. Second, the deepening of spatial and scalar divisions of labour and the creation of more opportunities for capital to move up, down and across the scales enhance capital's capacity to defer and displace its internal contradictions by increasing the scope of its operations on a global scale. Third, the exchange-value moment of capital is emancipated from extra-economic and spatio-temporal limitations at the expense of other systems (the growing separation of exchange and use values, as indicated above). Fourth, the capacity of the economy to escape the control of other systems and to follow its own procedures increases. And fifth, the capacity of nation states to confine an economic system's dynamics within the framework of the national matrix (e.g. national security or national welfare) has weakened.

3. Methodological remarks and caveats

As I have mentioned, this article presents selected findings from the case study of the transnational corporation Flextronics' subsidised investment in Brno. The focus of the case study is the interaction between the TNC and state and municipal bodies of socio-economic governance. The main aim of this article is to approach the case of Flextronics' investment from the perspective of the form-analytic, strategic-relational paradigm which will allow me to introduce some empirical findings and test the utility of some theories of post-Fordism in the context of ECE. It is not my

[4] Please note that the concept of ecological dominance is inherently system-theoretical and does not refer to Marxist economic determinism.

intention in this paper to provide a systematic theory of Czech capitalism; however, I would like to contribute to a future re-thinking of the post-Fordist theories from the perspective of the Czech Republic and ECE.

Therefore, in this paper I neither attempt to test the validity of the theory in a Popperian sense, nor do I give any evidence about the extent of post-Fordist transformations of capitalism as such. Instead, this study examines the case according to the logic of 'analytic generalisation' or 'analytic induction' [Brannen 1992; Yin 1989]. In contrast to statistical generalisation, where the findings are generalised from the sample to the population, in analytic generalisation the inference is made to the theory. The theory is a level of case study generalisation, that is, the testing of theories or theory building. "[A] previously developed theory is used as a template with which to compare the empirical results of the study" [Yin 1989: 38]. Accordingly, it is not generalised to all cases, but to cases matching the same theoretical propositions – to cases "in the same situation" [Yin 1989: 38].

In the case study I used multiple sources of evidence. I analysed newspaper articles related to the story and other documents, such as reports and statistics, which were provided by the city of Brno, by CzechInvest, the governmental investment-luring agency, and by the Regional Development Agency of Southern Moravia (RDASM). In addition, I conducted semi-structured interviews with the key actors involved in the story. I interviewed a member of top management at Flextronics, two top officials at CzechInvest, and two top officials at the Regional Development Agency of Southern Moravia. The interviews covered the main actors in the story.[5]

The research not only provides 'objective facts' regarding the case, it also shows the actors' interpretations of the Flextronics story and its socio-economic environment. The research reveals the decision-makers' notion of the environment, their frames of relevance, the types of rationality they use, the different constraints they face, and the expectations they have. Consequently, although the analysis of this case cannot provide a general account of capitalism in the Czech Republic or the ECE, it can provide an interpretation of some key decision-makers. This image of capitalism is of crucial importance since it influences some key policy decisions.

4. Flextronics' investment in the context of post-Fordist transformations

4.1 The story of Flextronics' investment in brief

In April 2000, Flextronics, the world's leading electronic manufacturing services provider, expressed an interest in building a plant in the city of Brno. At that time, Flextronics was already present in the city, where it employed approximately 750 people.

[5] The city of Brno was represented by the officials from the Regional Development Agency of Southern Moravia. Even though this agency is institutionally independent, it is connected with the city through social networks and it formulates and implements Brno's development policies (especially those relating to FDI).

The investment was subsidised by the Czech Republic and by the city of Brno. The subsidies were a part of a state investment-luring policy implemented by the Ministry of Industry and Trade and its agency CzechInvest. The state subsidised the investment through income-tax reliefs (Flextronics was exempted from tax payments for ten years), subsidies for employee training, and import-duty reliefs. The state made the subsidy conditional on the obligation of the company to construct a high-tech electronics plant, invest 10 million USD, and train 225 employees. The subsidy from the city of Brno consisted of the lease of the land in the industrial zone for free, with the prospect of a free transfer of land in the near future. The city also paid for the construction of the industrial zone. Brno made its subsidy conditional on the obligation of the company to create, by 2006, a total of 3000 new jobs that would continue for at least 5 years.

Flextronics opened the plant in September 2000. The number of people employed at the plant increased quickly and reached a peak of 2200 employees in 2001. In March 2002, Flextronics started to make substantial lay-offs. The recession in the electronics industry was cited as the reason. In July 2002, the company announced that it would be closing down and shifting production to Hungary and other countries, and that it would be laying off all the employees in Brno. Only the research and development centre that employed 34 researchers was to be preserved.

The government did not demand that the investment incentives granted Flextronics be refunded, since the investment had fulfilled the government's demands: it brought money, technology, and know-how. But the situation on the regional level was much more complicated than on the national level. In August 2002, the municipal council decided to cancel the contract for the free transfer of land that it had made with Flextronics in May 2002. However, Flextronics wanted to keep the land and did not want to pay back any rent. Moreover, it wanted to complete the transfer of the remaining land. Eventually, the city of Brno and Flextronics reached a settlement in March 2003. The company kept the land under the production hall; it paid Brno rent even for land it had received for free; it gave back one plot of land; and it paid off the rent it owed. For its part, the city bought the entrance building, the parking lot, the communications and infrastructure.

4.2 The story and its actors in the context of post-Fordist transformations

The story of Flextronics' investment is a post-Fordist type of interaction between the political and economic sphere. We are dealing here with the typical actors in a post-Fordist situation and with a post-Fordist economic engagement of the political system. The investigation of the interactions between Flextronics and public bodies also demonstrates that the state itself went through a post-Fordist reorganisation. However, contrary to first impressions, this case is not an example of the intentional short-term exploitation of a region by a TNC in a post-Fordist environment.

The major players engaged in this story, i.e. Flextronics, CzechInvest, the city of Brno, and the Regional Development Agency of Southern Moravia (RDASM), are

the principal actors typically involved in a post-Fordist situation. Flextronics is a transnational corporation (TNC), which is a dominant post-Fordist economic actor. CzechInvest, a state investment-luring agency that reports to the Ministry of Industry and Trade of the Czech Republic, represents a new kind of state engagement in the economy (cf., SWPR above), as it promotes the competitiveness of the locality and applies dependency management through a policy of investment incentives. The city of Brno is an example of a new site of power and a new subject of social policy in the post-Fordist political system. It represents the process of downward delegation of state power. RDASM represents not only a shift of state authority downward, but also a shift sideways, and the redefinition of public and private responsibilities. RDASM is a public-private body,[6] i.e. a joint venture of three bodies – the Association of Municipalities and Towns of Southern Moravia, the Regional Chamber of Commerce of Southern Moravia, and the Southern Moravia Region. RDASM is also a regional branch-office of CzechInvest. It assists Brno and the entire region in formulating and implementing social policies (the shift downward) and it manages regional cross-border co-operation (the shift sideways).

The story itself is a typical interaction between a social and political system in the environment of post-Fordism. It represents a SWPR type of economic intervention. The policy of luring investment and of investment subsidies in particular is Schumpeterian supply-side intervention. CzechInvest promoted the competitiveness of the locality by relieving Flextronics of the standard obligations to the locality (tax reliefs) and subsidising its investment and labour costs (the transfer of land, the construction of infrastructure and the training of employees). Moreover, CzechInvest applied dependency management by selecting investors on the basis of their ability to contribute to local development (the state made the subsidy conditional on the company's obligation to construct a high-tech electronics plant and to train employees).

Scrutiny of the scalar dimension of the interaction between Flextronics, the state and the region further supports the thesis about the transformation of the political system in the process of scale relativisation. The autonomous, non-state, regional actors were engaged in the interactions and negotiations with the TNC, which indicates the reorganisation of the political system. This is noticeable despite the small size of the Czech Republic, especially in the context of FDI flows. Even though the very policy of investment incentives was formulated on the national level and a considerable portion of the subsidies was provided by the state, the substantial portion of the subsidies was granted by the city and negotiated on the municipal level (e.g. transfer of land). Furthermore, the contracts between Flextronics and the state on the one hand and Flextronics and Brno on the other differed. The city had different priorities than the state with regard to the possible benefits of the investment. Also, the state's and the city's negotiations with Flextronics following the company's decision to leave differed, as did their respective perceptions of the whole story.

[6] RDASM labels itself as a 'non-profit public-private body'.

With regard to how the event was perceived, on the national level, the government, union leaders and most analysts remained confident that the closure of the electronics plant was an isolated event. Industry and Trade Minister Jiří Rusnok, for instance, remained bullish about the prospects for further foreign investment, saying, "One factory shuts down, but there are another ten coming" [The Prague Post 24 July 2002]. Moreover, CzechInvest calculated that the investment was of profit to the Czech Republic in terms of its financial costs and benefits. Conversely, the locality was dismayed and the departure of Flextronics caused local political turmoil. The quarrel was over responsibility for the failure, or, more appropriately, over the issue of irresponsibility. For instance, Pavel Březa (communist), an opposition councillor, stated: "I do not think that this is just a chance occurrence; on the contrary, it is the failure on the part of city officials" [*Mladá Fronta Dnes*, 13 July 2002]. Deputy Mayor Petr Zbytek replied that it was the social democratic government and its FDI-luring agency that recommended this untrustworthy company. The city council did not put the proposed removal of allegedly responsible officials to the vote because the municipal elections were about to come in four months. Thus, the citizens were left to judge. One of the official accused of responsibility for the investment failure defended himself by saying: "I cannot influence the global crisis. We have done everything *in order to prevent* Flextronics' departure from Brno. I do not think that we made any mistakes" [*Mladá Fronta Dnes*, 13 July 2002].

At first glance this story might seem a typical example of the (intentional) short-term exploitation of localities and the incentives that they provide by a TNC. This phenomenon, the new contradiction of post-Fordism, is often mentioned in the discussion about the consequences of the dissolution of the Fordist social fix.[7] However, the following facts indicate that Flextronics' investment is probably not such a case of exploitation. First, in the end Flextronics had to pay back the subsidies that it received from the city.[8] Second, the Brno adventure constituted a loss for Flextronics. And third, other explanations for Flextronics' departure are more compelling (see below).

[7] In particular, this phenomenon represents the spatial contradiction between the imperatives of social reproduction and economic valorisation. There is a contradiction between the notion of the mobile economy of flows and the economy as a locally embedded system comprising both economic and extra-economic resources. It enables capital to exploit local (extra-economic) resources without contributing to their long-term reproduction and then to move elsewhere and engage in the same short-term behaviour [Jessop 2000a, 2000b].

[8] There was no compensation for the state's subsidies, because Flextronics fulfilled all the obligations that had been set by the state.

4.3 Remote and local: interdependence or asymmetric dependence?[9]

This case study offers interesting insight into the nature of the local-remote interdependence, which results from the process of scale relativisation. The case demonstrates the complexity of a remote-local relationship. The very arrival of Flextronics contradicts the stereotypical notion of the one-way dependency of a locality on a non-local investor. In the case of Flextronics it is possible to observe the dynamics of the remote-local interaction. The impulse to carry out the investment did not come from the investor as a part of its development strategy. On the contrary, it seems that the impetus came from the local economic actors. Indeed, this investment is better understood as part of the development strategy of a local company, UTES Elektronika. In 1998 this company was doing quite well and employed about 300 employees. However, a lack of capital hampered its further development. Therefore, its owners decided to seek a 'strategic partner'. They finally succeeded when the company was bought by Devatron International, which later merged with Flextronics.

> [Manager of Flextronics:]
> If Flextronics were to have behaved ... normally, it would have certainly focused on Hungary. However, owing to our presence here, we were successful, we had our own projects, we had our own business development, which means ... that we were making contracts independently, in co-operation with the Flextronics network, naturally. Thus, let's say they let us do it here.

The analysis of Flextronics' departure makes the picture of local-remote dependence much more complex. The very decision of Flextronics to leave was based on remote events. It was mainly the world crisis in the electronics industry, triggered by the terrorist attacks on September 11, which led to the departure of the corporation.

> [Manager of Flextronics:]
> And everything was looking quite well, but then September 11 came, which ... started off the world crisis in electronics, stock-exchange problems, the fall of the dollar, the decline in purchase orders. It appeared that this segment of the economy had been typically ... overvalued, maybe speculatively, hard to say.

However the local situation did not directly reflect the world crisis. On the contrary, the local branch was 'in the black' during the decline in the world economy. The decision to stop production in Brno can only be comprehended in the context of the

[9] In this paper, 'local' refers basically to the national and regional scale; 'remote' refers to non-local – to the events that are not taking place on the national and regional scale of social and economic activities.

consolidation of Flextronics' international production chain. The corporation decided to shut down production in the Brno branch because it was relatively isolated from the other production sites. The Brno branch was profitable, but nonetheless was 'in the wrong place at the wrong time'.

[Manager of Flextronics:]

... we were a profit-making company, ... we were even at the beginning of 2002 a highly profitable company, afterwards ... unfortunately, because one of our big customers, which we had had here as a part of a worldwide tender, ... Flextronics simply did not win that tender, ... and the production moved somewhere else. Thus, let's say that we were not that profitable, but we were still in the black.

... anyway, the reasons for this measure [departure] were outside of the Czech Republic ... here in the Czech Republic ... we were simply, I would say, in the wrong place at the wrong time, there was no other reason, essentially.

Flextronics' decision to leave the locality was based on remote events (the world crisis); accordingly, the locality could not in any way influence the factors or events upon which the decision to leave was based. Consequently, the political debate in the locality was limited mainly to the struggle over the distribution of symbolic responsibility for the departure of Flextronics, which was perceived as a grand failure.

One might conclude that the locality is thus asymmetrically dependent upon events that it cannot influence. However, if we look at the case in more detail, this conclusion is simplistic and inadequate. The most interesting feature of this asymmetric, one-way dependence is its dialectics. In this case, local events were not directly shaped by remote causes. On the contrary, the local situation was the opposite of that occurring at a distance. Particularly during the deep crisis in the world market the local branch of Flextronics was highly profitable. The company's decision to leave the locality was based on remote factors (market crisis); nevertheless, it was made in the context of local prosperity.

We are dealing here with a situation in which the remote or the 'global' is a source of uncertainty for local actors. It corresponds to Bauman's account of power relations in contemporary capitalism (see above). In the Flextronics story, local actors could have little influence on the remote factors that determined local events, but the locality's prospects were independent of local prosperity or decline (whatever its causes). It was therefore almost impossible for local officials to anticipate future economic development – should they base their predictions on local success or remote crisis? Accordingly, the only explanation of events that they can offer is that the 'corporation decided', which is actually an adequate explanation.

[Expert #1 of RDASM:]

Simply, after a certain amount of time, Flextronics suddenly changed its plans, it was claimed that it was actually a decision by the management of Flextronics that the Hungarian branch was preserved and here production was reduced ...

Do you have any explanation as to why the firm decided to leave the Brno locality?
These are speculations, no one could tell you exactly why they decided to leave, simply, I would say, it was a decision of management.

4.4 The relation between the region and the TNC: where is the bargaining power?

As the nation state is 'hollowing out' and transnational economic actors are emerging amidst post-Fordist circumstances, the regional-TNC nexus is becoming a salient aspect in relations between the economic and political systems [Jessop 1994]. Let us consider the distribution of power in the relation between the TNC and the region in the case of the Flextronics' investment.

The interviewed officials did not concur on this issue. Experts from the RDASM found the bargaining relation that the region and the TNC were in to be generally asymmetric, while CzechInvest's experts did not.

[Expert #2 of RDASM:]
It is clear that the nature of the relation is that investors can materialise anywhere; however, we should not lower the [social and regulatory standards] we ourselves define. Thus, the relation is asymmetric.

[Expert #1 of CzechInvest:]
When speaking about the power relation between these corporations and the state ...
Why do you consider it a power relation?

The story of Flextronics allows us to make several points in support of the thesis that power in the relation between the TNC and the region is unequally distributed in the TNC's favour. First, as was demonstrated in the previous section, the TNC ('the remote') is a source of uncertainty for the region ('the local'). Second, the very policy of investment incentives is another source of the TNC's power [Beck 2000b]. Accordingly, Flextronics was freed from paying taxes and received other subsidies that helped it to minimise its costs (the training of employees, the transfer of land). Third, investment incentives are an essential aspect of 'global horse-trading' – the competition between localities to lure investors. Indeed, this case study shows that a) regions are generally considered to be in a situation of competition with each other over luring investors (e.g. the local politicians and media viewed this investment-luring process in the context of competing with a possible investment site in Hungary), and b) capital continually evaluates the activity of regions – it gives 'signals' to investors (see below). Regions are in a situation in which they can be rewarded or punished for their activity by investors, who can either bring capital to the locality or withdraw it (e.g. CzechInvest's director was unhappy when Brno cancelled the contract about the land transfer in case it would discourage other prospective investors). Both these facts are important sources of a TNC's power and bargaining potential.

[Hugh Kelly of Flextronics, Mladá Fronta Dnes 7 August 2002]
We do not understand why the city is implementing these measures. .... A significant precedent will arise for the future and it will send out a negative signal. It will mean that the business environment is unstable. It will complicate our situation in looking for a compensatory investor.

[Expert #1 of RDASM:]
The region attracts an investor through its behaviour. If the local government is qualified, if it is able to perceive the business priority of the investors, then, simply, quality arrives [i.e. investors, who bring value to a locality].

As a consequence, the norm of providing incentives and further assistance to capital emerged. TNCs expect that states or regions will assist and subsidise their activity. The reluctance to do so, or 'unpreparedness', is enough reason to invest somewhere else.

[Expert #1 of CzechInvest:]
Currently, virtually every state in Europe has its own investment agency and provides investment incentives to companies. At present, any state that does not provide investment incentives is almost automatically disqualified, it means ... this is one of the factors that creates the balance in such a way that without it the balance would be lost.

[Manager of Flextronics:]
Considering that the Czech Republic was not yet equipped with any investment incentives at that time, it [Flextronics] chose Hungary, which offered de facto tax holidays ...
Finally, we selected Brno, ... this locality was perfect because of its location; on the other hand, it was unprepared and, for instance, the city council was not experienced in assisting, but this was compensated for by the fact that we were already present in Brno, thus we were familiar with the local environment ...
and, to be honest, Brno wasn't recommended to us, indeed, given that it was not prepared.

4.5 Towards the economic system's ecological dominance?

Some indicators regarding the economic system's ecological dominance were mentioned above. The capacity to distantiate and compress time-space is what enabled Flextronics to escape the control capacities of the locality and the nation state. In addition, a semantic dominance exerted by the economic system can also be observed.

The semantic dominance is reflected in the way the state actors interpret the environment in which they formulate their strategy. The semiotic representation of the economy that the interviewed policy makers have is dominated by the image of

'globalisation' [cf. Hirst and Thompson 1999]. According to them, this process indisputably exists. CzechInvest's view is of a borderless, 'fully globalised' economy – an economy into which the Czech Republic is fully integrated and which puts substantial constraints on local policy options.[10]

Economic dominance is also reflected in the language and logic that CzechInvest's officials use to grasp social reality.[11] The economic logic used by the state could be observed in the way it formulated the contract with Flextronics and evaluated the very story of electronics investment. The demands made by the state in the incentive contract were formulated according to economic logic – the state's requests were mainly monetary (to invest 10.6 million USD[12]). Accordingly, CzechInvest evaluated the Flextronics story in terms of crude financial cost-benefit analysis.[13]

The semantic hegemony of the economic system is also reflected in the way in which CzechInvest's officials think about social reality. In analysing and evaluating social reality, such as competition between regions, they are reluctant to engage criteria other than economic (e.g. economic growth). They grasp social reality merely through economic concepts and comparisons (e.g. market, supply and demand). CzechInvest's officials refuse to distinguish between economic and political or social spheres and their respective logics (e.g. they do not see a difference between the state and the firm).

[Expert #1 of CzechInvest:]
With regard to the policy [of FDI-luring], it is the same as if a firm decided to stop advertising its car and supporting the advertising industry, because it would consider this as influencing the customer. It would sell and produce cars without spending a crown on advertising. You can imagine the position of such a firm in competition with other auto factories.
However, one could object that the state is not a firm.
And what is the state?

[Expert #1 of CzechInvest:]
Do you view it as a problem that there is, as you say, a situation in which different states with different social standards compete globally to lure capital? [abridged]

[10] Neither CzechInvest nor RDASM supported their arguments with any analysis of the extent to which economic activity has been internationalised. The experts at CzechInvest based their arguments mainly on 'general numbers'. However, RDASM's experts implicitly referred to some of the debates going on in the social sciences over contemporary social change.

[11] This assertion is not tenable in RDASM's case. Paradoxically, the officials at this partly private institution do not employ economic logic and language as much as their state colleagues do.

[12] In addition, Flextronics was required to train 225 workers and build an electronics-manufacturing plant.

[13] According to this analysis, the direct profit of Flextronics' investment was approximately 648 million CZK (see www.czechinvest.org for details).

> This is a typical example of supply and demand. For instance, in Singapore, thanks to the fact that their products are successful, the demand for their workforce will increase, and the supply of people that are willing to work for relatively low wages will decrease. As a consequence, there will be an equilibrium on a higher level. This means that the economy of Singapore will advance. ... Therefore, the price and level of social standards will come closer to the European conception.

As a result of this, the market is attributed nearly universal capabilities – e.g. it evaluates the appropriateness of social standards and market regulation.

> [Expert #1 of CzechInvest:]
> ... if France reached this stage when the employees, the unions, and the state in general were exacting too generous a social system from firms, which the firms were unable to cover, then, evidently, some change has to happen. Currently, the economy of France suffers owing to this. It is necessary to view it in the sense that some balance must to be achieved.
> *Thus, as you say, the firms determine the balance; they decide what a too generous welfare state is?*
> That is determined by the world economy.

To conclude, the semantic dominance is an importance aspect of the capacity of the economic system to enforce its logic on the political system. The story of Flextronics offers some indicators of the semantic dominance of the economic system, such as the economic language and logic that CzechInvest's officials used to grasp social reality.

5. Conclusion

This paper attempted to introduce and demonstrate the utility of the form-analytic, strategic-relational approach for empirical research in the Czech Republic. It also tried to show the relevance of the theories of post-Fordism in the context of the Czech Republic and ECE. I presented selected findings of my case study of Flextronics' investment in Brno, which focused on the relation between the investor, on the one hand, and the state and city, on the other hand.

The story of Flextronics' investment was interpreted here as a post-Fordist interaction between an economic and political system. The efforts of the state and the city to attract Flextronics to the locality and the following state-city-TNC interaction are post-Fordist economic interventions: Schumpeterian supply-side management. The state and municipality tried to promote the competitiveness of the region through investment incentives. The analysis of the scalar dimension of this interaction demonstrated how the political system was transformed in the process of scale relativisation. An investigation was also made into the nature of the relation be-

tween the TNC and the region. This relation was found to be unequal and to the region's disadvantage. The article showed that there was no one-way dependence between the region and the TNC, but rather a relation of complex dialectic interdependence. The power of the TNC was based on the competition between localities to lure investors and the nature of this power corresponds to Crozier's domination strategy. It was concluded that the story of the Flextronics' investment and the way the state officials grasped, interpreted, and evaluated the story give tentative indications that the economic system is tending towards ecological dominance.

The form-analytic theory of post-Fordism and post-Fordist governance was employed uncritically without taking into account the particularities of Czech capitalism. Unfortunately, there is no ECE-specific conceptual apparatus and this is a fundamental gap in the comparative theory of capitalism from the perspective of form-analytic, strategic-relational approach. I hope that this article will provide incentives for rethinking the theories of post-Fordism in order to theorise about the particular, local articulation of capitalism(s) in the ECE region.[14]

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[14] For some attempts to draw on, see Altvater [1998] and Pickles and Smith [1998].

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'Economic Culture' as an Explanatory Tool in Transformation Research*

MAREK SKOVAJSA**

Abstract: This article reviews theoretical suggestions concerning the conceptualisation of economic culture that were made in a series of publications on the cultural dimension of post-communist transformation by the Institute for Research on Eastern Europe in Bremen. Analyses are made particularly of the points where culture on the one hand and institutions, social capital and civil society on the other overlap and differ and from these comparisons consequences are drawn for use of the concept of economic culture in transformation research. The article concludes that economic culture is a conceptual category in its own right, neither irreducible to the level of institutions, in the sense that institutional economics understands them, nor to social capital or civil society. If, moreover, economic culture is to be used as a tool for explaining socio-economic processes, its strict separation from institutions, social capital and civil society is essential.
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An underestimated dimension? This obviously rhetorical question figures in the title of a book that, in 1999, opened a series of publications put out by the Institute for Research on Eastern Europe at Bremen University, all of which stemmed from interdisciplinary conferences that were organised by the Institute and dedicated to the task of contributing, by means of theoretical reflection and empirical analysis, to understanding the influence of the factor of 'culture' on the transformation process in Central and Eastern European countries. With 82 articles published in the five books in the Bremen series [Höhmann 1999, 2001, 2002; Höhmann, Fruchtmann and Pleines 2002; Höhmann and Pleines 2003], the number of contributions is indicative of how concentrated and sustained an effort this was to analyse the cultural co-determination of the transformation processes. The authors of the articles come from various German research institutions and also from a number of transition countries, mostly from Russia, but also from Poland and the Czech Republic.

As is the case with most collections of texts, and especially collections of contributions drawn from conferences, it is hardly possible to speak of a single tune

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and even less so of a common set of positions on at least the most central topics in all the studies published in the Bremen series. This may be less of a surprise given that the subject matter that unites all five volumes is a concept as ambiguous and contested as culture, or more specifically culture in its role as a factor in economic life in general and in the economic transformation of post-communist societies in particular. The great variation in approaches, views and evaluations, however, is rather more a virtue than a vice. It allows, at any rate, for a fruitful confrontation of different views, which are often conditioned by the different stereotypes that have evolved in various social science disciplines or strands of research and maintained by them in sterile isolation, away from the incentives stemming from developments in other branches. On the other hand, the reader might feel entitled to demand a more unifying principle underlying a series than just a common topic, and perhaps also some indication of which texts form, so to speak, the flagship contributions representative of the whole project. The rather loose organisation of the volumes, although they give preference to theoretical contributions over case studies and empirical analyses, does not seem to correspond to such concerns. The reader is thus left with the option of digging into the volumes individually in search of exceptional texts in the field of theory and empirical research on economic culture.

As far as theoretical reflection is concerned, the best introductory texts can be found in the first volume [Höhmann 1999], especially those by Carsten Herrmann-Pillath and Stephan Panther, who both attempt, each in their own way, a definition of the research field of the economic-cultural analysis of the transformation, while they also discuss available methods and warn against the pitfalls that lay in wait for less cautious researchers. The most systematically organised block of theoretical articles can be found in the second volume [Höhmann 2001], where different approaches to the study of transformation from the viewpoint of economic culture are portrayed and, in varying degrees, adapted to the demands and requirements of transformation research. Along with institutional economic studies by Joachim Ahrens and Uwe Mummert the block contains studies on the political-cultural research on transformation (Stefan Garsztecki), the concept of social capital as a potential category in economic culture research (Bernhard Lageman) and civil society as an integrating cultural concept (Stephan Panther). It is especially these theoretical contributions that form the point of departure for the discussion presented in the later parts of this review. The two theoretical texts in the latest volume [Höhmann and Pleines 2003] by Helmut Leipold, Carsten Herrmann-Pillath and Christian Hederer are dedicated to conceptualising the way culture exerts an influence on the economy from the perspective of evolutionary institutional economics.

Alongside theoretical ruminations on what economic culture is and how it can be used in transformation research, the five volumes discussed here also contain a wealth of empirical studies dealing with individual topics, which, to do justice to the authors of the respective texts, warrant specific mention: in the first place, various aspects of the Russian economic culture are addressed, including the culture of Russian

entrepreneurs and economic elites, corruption and informal networks, tax-related behaviour (a section of one book [Höhmann 2002] and one entire volume [Höhmann, Fruchtmann and Pleines 2002] are dedicated to this particular topic) and the economic policy of the state. The Russian and Polish economic cultures are the subject of an interesting section on 'Mirroring the Economic Transformation in Science, Joke and Literature' [Höhmann 2002], which, with its focus on artefacts that belong to the realm of so-called high culture, opens up to economic-cultural research on transformation a perspective largely absent from literature. Finally, other sections are dedicated to: the role of culture in the practical economic relationships between 'West' and 'East'; the contribution of cultural geography to transformation research; the cultural dimension of regional development in post-communist countries; cultural influences on economic policies in Poland and the Czech Republic and cultural aspects of the break-up of Czechoslovakia.

The sheer breadth of issues addressed in the volumes from the Bremen series makes it very difficult for a reviewer to cover all of them in a single review. The already mentioned generosity and tolerance on the part of the editors with regard to differences in the approaches adopted by individual contributors makes it impossible to argue outright for or against a single position as representative of the whole project as such in any particular area it is concerned with. The remaining sections of this review article are therefore dedicated solely to the discussion of, in my view, some of the highly interesting theoretical suggestions regarding the interpretation of the central concept of culture put forth by the participating researchers. I will attempt to insert these into broader theoretical contexts and, in doing so, push the whole debate about economic culture and its role in the transformation process towards greater clarity and articulacy. This will occasionally involve the elucidation of some of the shortcomings that seem to me to be inherently present in many attempts to develop a conceptual framework for the study of economic culture which would enable it to profit from the results achieved in closely related fields, such as institutional economics or sociological research on social capital.

The task of assessing the quality and innovativeness of empirical studies dealing with different aspects of the cultural conditioning of the economy in various transition countries can be more fruitfully coped with by specialists on particular countries or areas, and thus it will remain outside the scope of this review.

Once again: what are we talking about when we talk about culture?

Not only may one start, one may also end with this notoriously difficult question. The authors of the theoretical contributions on culture in the volumes reviewed here know this well enough. The more valuable then is their effort to come up with, once more, viable, unambiguous and operationalisable conceptions. What might be a source of some confusion, however, is that the theoretical articles in the various volumes try to link or identify culture with such diverse concepts as civil society, formal and/or in-

formal institutions, cognitive models and social capital. Such breadth of scope can be understood as a result of a concerted effort to find a truly encompassing definition of culture that well meets the needs of transformation research. On the other hand, this endeavour may quite easily be exposed to objections of eclecticism. It is therefore no less important to spell out the essential differences between these concepts than it is to emphasise a certain level of interconnection between them. I will address the two issues of their deep similarities and insurmountable differences below. But first the central problem of the definition of culture must be briefly discussed.

Innumerable attempts have been made to define culture in a manner acceptable throughout the social science community, but since a full consensus has never been achieved, it seems to be the first obligation of each and every author dealing with cultural factors to make explicit his/her own understanding of culture. In the volumes under review here this obligation is fulfilled most explicitly in a theoretical article by Stephan Panther, who endorses a conception of culture common in the field of cognitive social anthropology and defined as a "learned system of meanings (and evaluations) shared by a group of actors" [Höhmann 1999: 24]. Since this same cognitivist conception of culture is later modified (by Panther himself, see below, or by Stefan Garsztecki who propounds a Geertzian, 'thick description' perspective [Höhmann 2001: 67]) or outright criticised (by Helmut Leipold in an article on culture from the viewpoint of institutional economics [Höhmann and Pleines 2003: 16–18]) there does not seem to be much of a common ground or basic tonality where the authors converge in their thoughts on culture. No attempt at a systematic derivation of the concept of culture from general theoretical premises of whatever kind can be found in any of the volumes; all theoretical contributions are rather proposals for the creative appropriation of some already existing influential view of culture, such as the cognitivist one presented by Panther. On the other hand, the thoughts of the authors while reviewing existing conceptions of culture and offering their own commentaries on them are in no way theoretically naïve, nor do they betray an ignorance of recent developments in the discussions about culture in sociology, economics, political science and social anthropology.

Above all, it must be acknowledged that most authors are well aware of the risks inherent in both theorising and researching the presumed cultural determinations in social and economic life. This is especially true of the contribution by Carsten Herrmann-Pillath in the 1999 volume, in which the author takes exemplary precautions against the many mistakes that are otherwise typical in cultural analysis. In my eyes those worth mentioning are: the impossibility of relating culture as an explanatory factor to individual behaviour; the false location of culture on one level, most typically that of the 'nation'; the unproductive equation of culture with 'tradition' and 'history', concepts that are themselves in need of clarification; the disregard of the fundamental fact that the observation of culture always occurs through the eyes of an observer, who is herself prisoner to some cultural scheme. This last property of cultural analysis is in itself sufficient to set clear cognitive limits to cultural analysis of economic and social behaviour. Yet, the debates about cul-

ture in the social sciences are to a large extent debates about where these limits are situated and how, given these limits, the concept of culture can be made fruitful in the analysis of social reality.

I now turn to the discussion of what I consider to be the crucial problem in the theoretical reflection of economic culture presented in the volumes under consideration, namely clear demarcation of the meaning of the term 'culture' in contrast to the meanings of other concepts with which it, as some authors suggest, commingles or to which it is even identical.

Culture vs. institutions

Typically for research on economic transformation, the attempts at ascribing a more specific meaning to culture are at the same time attempts to make it partly or fully coincide with some more familiar concepts used in the analysis of economic processes, which, it could be argued, are just other names for culture preferred in various social science disciplines for reasons that have to do with the contingencies of their historical development. In the volumes of the Bremen series, I found three such attempts that are in my opinion worth discussing here. They are the proposals to establish close links between culture and institutions, culture and social capital or culture and civil society.

It is more than natural that within the research on economic transformation ways are sought to reconcile the culturalist strand with the older and more established approach of institutional economics. This is attempted in the present volumes by a number of authors (Uwe Mummert, Eckehard Rosenbaum, Joachim Ahrens, Helmut Leipold). Although the issue of how culture is related to the central concepts of institutional economics is avoided by all these authors except for Leipold, it seems in all cases that such approximation between the two approaches is meant to occur through some kind of fusion of culture and institutions.

The case of institutions is extremely interesting. Of course, the inclusion of institutions – as patterns of behaviour – among the component parts of culture has long been part of the common stock of knowledge in some streams within social anthropology (for an older but highly influential classification see Kroeber and Kluckhohn [1963]). Institutional economics, on the other hand, understands institutions rather as rules, both formal and informal, that constrain individual behaviour. From the viewpoint of this thriving and well established discipline, the identification of culture with institutions-as-rules, or the inclusion of the latter in the former, would make any culturalist approach look redundant in the first place and marginal in the second. For this reason, it must be asked whether a view of institutions and culture that makes a distinction between the two is tenable, in the first place, and, further, if it can be of any potential benefit to economic and social research in general and to the research on transformation in particular. In other words, we should ask if there is any added value to the culturalist approach that accords central importance

to culture as opposed to institutional economics, emphasising the role of institutions-as-rules in our understanding of economic processes.

Unlike the views that seem to be implicitly present in some contributions in the volumes, and unlike the above-mentioned currents in social anthropology, I believe that it is essential to sustain a clear-cut distinction between institutions and culture. One reason is that the view of institutions in institutional economics is too narrow to cover the entire sphere of culture. Another reason is that the distinction between culture and institutions acquires an especial relevance in transformation research, because in the processes that constitute the economic, political and social transformation, *institutions are transposed from societies of a certain cultural type to societies endowed with a culture that is in many respects different.*

Let me start with the oversimplification into which institutional economics has fallen by using too narrow a view of institutions and their operations in the broader social context. The parsimonious definition of institutions as "the rules of the game in a society or ... humanly devised constraints that shape human interaction" [North 1990: 3] might serve well the tastes of economists brought up with the mainstream way of thinking in their discipline. However, the concept of institution-as-rule or constraint, although it covers a certain crucial aspect of the social context of economic behaviour, lacks the potential for a deeper analysis of how and why actors behave the way they actually do. The conception of North and others is of rules as norms, according to which actors organise and shape their *interaction*. And although there can be no doubt that rules in this sense are an essential part of every culture, there seems to be a wide range of objects that belong also to culture but are rather difficult to interpret as rules of interaction. For instance, there are symbols, narratives and schemes of perception that serve individuals in finding their bearings in the world, by reducing its complexity, and also in constructing their own identity and identifying other objects, but which are not rules of interaction proper – notwithstanding their clearly inter-subjective, and hence social nature. To be sure, such cognitive and perceptual frameworks also play a role in the formation of rules of interaction. But to reduce culture to such rules would be to ignore that human beings not only behave or interact, but also perceive, interpret, imagine, plan, intend, hesitate and do all kinds of other things that cannot be described as interaction in the usual sense. And since those non-rule-like components of culture exert an influence on its rule-like parts, any attempt to explain or understand behaviour that is based solely on knowledge of rules of interaction is in itself insufficient. Not everything there is to culture is rules or sets of rules, unless we overstretch the meaning of 'rule' as a socially enforced instruction for interaction with others – which is what North and other institutional economists have in mind – and extend it much further to denote any principle of an agent's activities, whether they involve other persons or not.

This view does not contradict North's treatment of culture that is offered in the chapter dealing with informal institutions where he takes culture to mean "transmission from one generation to the next, via teaching and imitation, of knowl-

edge, values, and other factors that influence behavior" [North 1990: 37; quoting Boyd and Richerson]. Although he also asserts here that informal constraints are part of what we call culture, an equation between informal constraints (or, informal institutions-as-rules) and culture is never made.

Furthermore, the evolutionary understanding of the genesis and selection of institutions-as-rules strongly present in institutional economics (and drawn on in the Bremen volumes) obviates the need to specify the ways in which individuals consider them as binding for themselves. In other words, the evolutionary perspective enables us to see that, and to see why certain institutions have asserted themselves in the struggle for survival while others perished, but it does not tell us much about how the victorious institutions are incorporated into the ways of thought and action – or simply culture – of individual members of a given group. This problem perhaps touches on a major contrast between the economist's perspective (including that of the institutional economist) and the culturalist's perspective on economy and society: the economist is interested in 'culture' only instrumentally, as a means of increasing the explanatory force and scope of his/her models, but these are built around some basic premises (self-interested and rational individual actors, selection through competition) which are culturally conditioned and therefore questioned and thoroughly relativised in any truly culturalist theory.

The problem of the insufficient depth of analysis of culture in institutional economics does not disappear when the widely used distinctions of formal/informal or external/internal institutions are introduced. Both dichotomies hinge on the presence/absence of a second-order institution, most typically the state, which enforces the observation of certain rules. Yet, if our understanding of rules is poor, in so far as concerns their substance and place in the make-up of a culturally constructed and meaningful world in which individuals act, then it will remain poor however complex the structure of mutually reinforcing and interdependent sets of rules may turn out to be.

It is also important to note that the concept of institutions-as-rules, far from being an analytically simple one, can be deconstructed into its more fundamental constituent parts. That rules are followed requires some kind of emotional, moral or rational motivation on the part of the agent, which cannot be reduced to the perception of expected benefits and losses. On the contrary, it requires a richer concept of culture to be fully grasped. The motivation, in its turn, presupposes some emotional, moral or rational attachment to certain objects that are commonly referred to as values [Deth and Scarbrough 1995: 22]. I believe that it is more sensible, and allows for deeper levels of analysis, to talk about human behaviour in terms of values pursued than in terms of rules followed, without losing sight, for that matter, of the disconcerting vagueness of the concept of value. The talk about values moves us away from the narrowly defined area of institutions-as-rules towards that of culture.

To sum up, the first line of argument against the conflation of culture and institutions as conceptualised by institutional economics has shown that the latter's view of institutions is too narrow. This poverty of understanding is an advantage

from the point of view of an explanatory science, which must first solve the problem of the reduction of complexity vis-à-vis reality before it can offer any scientifically sound accounts of what is going on in the social world. It is entirely acceptable as long as this discipline does not fail to achieve the goal it has set itself and is able to produce solid explanations and descriptions. Once this ceases to be the case, the reduction of complexity must be undertaken anew, this time in a less radical way, allowing for less simplification. Something of this kind is happening, in my view, with the rising interest in the concept of culture among the social sciences in general and in economic sociology in particular.

The second grounds for substantiating the conviction that culture and institutions must be kept apart, as two separate kinds of social objects, is, in my view, the concern about analytical clarity in the area of research on transformation. As already mentioned, transformation has also been an exercise in institutional engineering, where the institutions that had evolved over time in developed economies were to be transposed into the potentially fertile, yet uncultivated field of the post-communist societies. An essential observation worth making here is that unless we follow an excessively simplistic view of this process, it involves the transmission of both *formal and informal* institutions. As is well known, the performance of transition countries in adopting these institutions varied considerably, and it is certainly no exaggeration to say that it has been precisely this observation that provided strong incentives for the rapid increase in the level of interest in the cultural conditioning of economic and political processes. In other words, culture can be seen as the factor that explains variations in the capacity for institutional transformation across countries. The identification of culture with institutions would, of course, make such use of culture for explanation highly problematic.

It must be noted here that there is a certain amount of ambiguity in the meaning of the term 'institutions', which makes it such a frequent source of misunderstanding and confusion. In the context of transformation research, and even more clearly in the context of preparations for membership in the European Union, institutions mean, first and foremost, the formal structures and organisations that had to be created as a part of the effort to build an 'institutional infrastructure' for a functioning market economy and successful integration into the EU. This use of the term might have given rise to two instances of confusion. First, institutions are frequently identified with organisations, a practice as common as it is misleading, once any serious analysis is to be undertaken. Second, institutions are sometimes reduced to the idea of formal institutions, leaving the hugely important field of informal institutions unattended.

This last ambiguity brings us to the question of whether culture, after all, cannot be identified with informal institutions. The authors of a highly interesting theoretical introduction to the study of Polish economic culture seem to offer an affirmative, albeit hesitant, answer to this particular point [Kochanowicz and Marody 2003: 346–7]. However, I do not think it is wise to equate culture with informal institutions for reasons already expounded in the discussion about the weaknesses of

the understanding of institutions in institutional economics. Unless the definition of informal institutions is extended beyond that according to which these are informal rules of interaction, then there is more to culture than merely (informal) institutions. Kochanowicz and Marody, at the end of the day, also seem to favour a broader conception of culture, since their definition of economic culture includes value systems, cognitive schemes and patterns of behaviour [ibid. 349].

It remains to be seen what is to be gained or lost if the genuinely culturalist perspective on economic research is adopted (as opposed to one that chooses the concept of institutions-as-rules for its point of departure). Since institutions and culture are taken in this perspective to be two different entities, this question makes sense. The simplest answer seems to be this: by adopting an economic culture position one gains in terms of analytical scope and the richness of material studied, but loses in explanatory potential.[1] In a culture, values, norms, identities, symbols and shared meanings form a unique complex, which, although not necessarily internally consistent, offers the individuals socialised in it instructions on how to behave in any typical situation that might arise. Accounting for the behaviour of groups in terms of culture is, however, much more difficult than doing so by relying on the more reductionist concept of rules. One must accept that the price for increased theoretical sophistication and, I believe, greater approximation to reality is a reduction in the usefulness of the approach for generating simple and elegant explanations for human behaviour. If I may here employ terms borrowed from late 19th century neo-Kantian philosophy – culture seems more suited to idiographic than nomothetic use.

Culture vs. social capital

Unlike institutions-as-rules, which might be thought of as overlapping if not coterminous with culture, the concept of social capital can be interpreted in ways that preclude any possible synthesis with culture. The problem here is that social capital is a concept no less ambiguous than culture and, as such, has also been ascribed a great variety of meanings, some of them mutually exclusive or incompatible. At least two different conceptualisations of social capital are worth recalling: one, proposed by Coleman, considers social capital as stemming from the properties of social structure; the other, presented in the much acclaimed work of Putnam, Leonardi and Nanetti [1993], I will here call 'mixed', because to some extent it incorporates both

[1] One can draw a parallel between this approach and the use of the concept of cognitive models that is also discussed in some theoretical studies of the Bremen series. Institutional economists came up with the concept of cognitive models to cover the beliefs of the actors about the qualities and regularities of the world they live in that co-inform their behavior [North 1990: 8]. Cognitive models, without any doubt, bring this strand of research much closer to the culturalist perspective than the overly reductionist concept of rules as discussed above. Yet, the price it has to pay for it is again the same: a loss of explanatory power.

been done so far to overcome the confusion surrounding the operation and mutual interdependence of structural and cultural factors that have bearing upon them.

Culture vs. civil society

A third attempt at conceptual synthesis that I found highly inspiring, but also highly problematic, in the volumes under consideration here is that between culture and civil society. In the contribution most expressly focused on civil society a plea is made for its identification with a culture (Panther in [Höhmann 2001]). A necessary precondition for this is the expansion of the concept of culture in such a way as to include behaviour or, as Panther refers to it, the structure of interactions. As in the case of social capital, this seems to me perfectly possible, provided the researchers are well aware of the risk of potentially indiscriminate use of culture and avoid any fallacious conclusions that they might be tempted to derive from it. Yet, once again, what is the benefit for economic culture (or, for that matter, any culture-oriented research) of identifying culture with structure? Civil society without a doubt means in the first place a certain type of social structure. When talking about civil society as a culture, two dimensions become deeply intermingled which for analytical purposes it has proved useful to keep apart. Something gets lost from the analytical power of the concept of culture and it is entirely unclear in what way it could be used for *explanations* in the study of any social process with bearing upon social structure.

If, on the other hand, the narrower understanding of culture is preserved, talk about civil society as a (civil or civic) culture makes sense, as long as what is meant is that civil society needs a certain specific type of culture to support it and to cultivate its members with the values, norms, beliefs etc. that are indispensable for its constitution and maintenance. I see no chance of going further than this and no cogent reason to conflate civil society and culture. A perhaps remotely similar attempt, that of Jeffrey Alexander [1993], did not venture as far when it proposed the *discourse* of civil society as the subject matter of cultural studies, conversely emphasising the preservation of the fundamental distinction between culture and structure.

One can only agree with Panther's conceptualisation of civil society as forming one of several social sub-systems, without any claim to superiority over others, most notably the state. This perspective enables one to see how civil society, or, more exactly, the culture supportive of civil society, might establish itself as a relevant category of the cultural analysis of the economy. This is so for a number of reasons that become visible on the structural level, hence the usefulness of a way of reasoning that follows simultaneously structure and culture as two distinct, yet inseparable layers of social reality. First, civil society partly overlaps with the economic sphere, and, second, there are beneficial input and output functions mediating between civil society and the economy, which require a supportive cultural environment in order to become fully operative [cf. Höhmann 2001: 100–2]. Third, the

study of the way economic culture and economic behaviour are interrelated might proceed analogically to research on civic culture in relation to civil society, in which case the more developed research on civil society and its culture might serve as a rich source of ideas and approaches for research on economic culture. Finally, the culture of civil society is, like any other sectional culture, embedded in and overlaps with the broader societal culture as such, with all its rich structuring and complexity, and thus it contains elements of the latter that, because of an analogous immersion of the economic sub-system in the social system as such, are also 'parts' of the economic culture.

Conclusion: culture as irreducible to institutions, social capital and civil society

There is little need to prove that the approach to post-communist transformation in its economic and also its political dimension, from the vantage point of culture, is legitimate as a residual analytic procedure, ready to assist the puzzled researcher whenever supposedly more reliable approaches fail to bring him/her adequate results. For this I think enough evidence has been gathered in the books reviewed, and elsewhere, through the many examples of the undeniable influence of cultural factors on the functioning of transforming societies. Yet it takes more to demonstrate that the cultural approach can yield explanations that are sufficiently robust as to become a legitimate fully-fledged alternative route leading to a deeper understanding of the transformation processes. This cannot be done without an adequate revision and adaptation of the concept of culture, something that has been to some extent undertaken in the series of books reviewed here. While leaving aside the supremely important questions of operationalisation and methodology, I have pointed to some problems and ambiguities linked to such revisions of culture which aim at bringing it closer to other key concepts frequently used in socio-economic literature. It remains to be seen if the respective alliances between culture and these other concepts can be employed as an instrument of explanation with any cognitive gain whatsoever in the study of cultural influences on economic processes.

It might be useful to first recall the two criteria proposed by DiMaggio for even the possibility of a successful cultural explanation of economic phenomena: "To establish a 'cultural effect' ... [f]irst, one must demonstrate that individuals or collective actors with some specific kind of culture behave differently than others without it. ... Second, one must demonstrate that such differences do more than mediate structural or material influences" [DiMaggio 1994: 28]. Taken together, these two criteria represent the minimum set of requirements that any cultural account must comply with. Let me call the first of them the criterion of comparative behavioural difference, and the second the criterion of the irreducibility of culture.

Culture as institutions. If institutions (all or just informal ones) are taken to be the core of culture, the question of the influence of culture on behaviour becomes obscured, to say the least. On a level where institutions are identified exclusively

structural and cultural elements. It is of course between social capital as a property of the social structure and culture that the issue of incompatibility arises. In the face of proposals to resort to the concept of social capital in the framework of cultural analysis such as that presented in the Bremen series (Lageman in [Höhmann 2001]), one should ask whether social capital can be related to culture in any meaningful way, how this can be done, and what the potential benefits of this step for our understanding of economic and social processes could be.

According to Coleman, social capital "constitutes a particular kind of resource available to an actor" that unlike other forms of capital "inheres in the structure of relations between actors and among actors. *It is not lodged either in the actors themselves* or in physical implements of production" (emphasis M.S.) [Coleman 1988: S98]. That said, it is clear that social capital in the sense attributed to it by Coleman cannot be considered to be a synonym for culture or a segment of it. For culture, after all, as a system of shared meanings, beliefs etc., is lodged also, albeit not exclusively, in the actors themselves. Coleman follows Bourdieu both in stressing the relational or group-membership aspect of resource mobilisation by individuals in case of the social capital and in keeping it clearly distinct from the form of capital carried by and *in* individuals, which both authors, quite significantly for us, call *cultural* capital.

In my view what is important is the emphasis laid on the purely structural-relational content of social capital: it can be observed and measured in absolute independence of the properties that may be located in the individual, including other forms of capital, even if, of course, the conditions whereby it is acquired and accumulated are strongly dependent on the amounts of other types of capital in his/her possession. Were the term social capital to denote something other than accumulated resources derived from an individual's position in group and network structures, its semantic field would necessarily overlap with those of other types of capital, a circumstance that would make it redundant and confusing. One should, therefore, defend the isolation of social capital from other forms of capital in Coleman's sense on the grounds of its analytical clarity.

The use Putnam et al. make of the concept of social capital is much more prone to misunderstanding and ambiguity. The reason for this lies in his insistence on the impossibility, or at least the unproductiveness, of separating culture from structure: " .... attitudes and practices constitute a mutually reinforcing equilibrium. ... In this context, the culture-vs.-structure, chicken-and-egg debate is ultimately fruitless" [Putnam, Leonardi and Nanetti 1993: 180–1]. This view forms the background against which one must contemplate Putnam's central concept of civic community, which denotes a set of mutually reinforcing cultural and structural features: "The norms and values of the civic community are embodied in, and reinforced by, distinctive social structures and practices" [ibid. 89]. Even if social capital in Putnam et al. is mostly considered to be a structural property (cf. Tatur [Höhmann 2001: 208]), its definition as "features of social organization, such as trust, norms, and networks" [Putnam, Leonardi and Nanetti 1993: 167] makes it a clearly ambiguous concept, stretching simultaneously over portions of both the structural and cultural

sides of social reality. This is not surprising at all in light of the just quoted conviction of Putnam et al. that the distinction between culture and structure misses the point of social analysis. It might have been this ambiguity, too, that led some authors to praise the work of Putnam et al. as "a stunning breakthrough in political *culture* research" [Laitin 1995: 171] (emphasis M.S.), although its extensive reliance on the analysis of social structures is undeniable.

It is possible, of course, to accept the use of the concept of social capital by Putnam et al. as a structural-cultural feature of administratively efficient and civically active societies, but one should not fail to notice the lack of conceptual and analytic clarity in comparison to Coleman's definition. On the other hand, it is undeniable that their conceptualisation has achieved, at the price of reduced analytical transparency, a better approximation to real social life, avoiding at the same time the necessity of resolving the notoriously unsolvable puzzles posed by the interdependence between cultural and structural variables.

Turning back to the question of how culture and social capital can be synthesised and what beneficial effects this might have for research on economic transformation, I would like to argue that the best answer is that a synthesis is not possible or even desirable and that it is more important to clear up the confusion than to attempt to establish close links where there is a difference of order. This certainly holds for Coleman's structural definition of social capital. As to the position of Putnam et al., we have seen that their entire approach is resolutely opposed to any attempt to resolve the mystery of how culture and structure influence each other. Therefore, it does not seem sensible to put their concept of social capital at the service of cultural explanations for such processes that so deeply affect the social structure as the post-communist transformation.

If social capital is a structural or, at best, a mixed structural-cultural feature, then it should not be thought of as part of economic culture. Its clear separation from culture can, however, enhance the scope of potential explanatory tasks for the concept of culture. Above all, the question should be asked as to the ways in which social capital as membership in groups and networks can be culturally co-determined. In other words, are there cultural causes behind the differing levels of intensity of associational life, the density of personal networks and the frequency of occurrence of any type of social group, which could serve as a source of social capital for its members? The book by Putnam et al. on Italy produces evidence of the impact of culture on the structural features of Italian regions, although the historical naivety of his approach has been repeatedly exposed to strong criticism [e.g. Tarrow 1996]. But it is one thing to have evidence of the strong cultural conditioning of social capital in its structural meaning, and another to deny its distinctiveness as opposed to culture. Without a doubt the study of the cultural sources and the cultural effects of social capital is an immensely promising field of research, in spite of all the conceptual ambiguities that seem to abound in this strand more than elsewhere. Yet, it is also to be regretted that in spite of the extreme popularity of such keywords as 'trust' or 'civic community' in social science literature, not enough has

with the rules of behaviour, the criterion of comparative behavioural difference becomes tautological and irrelevant. All observable differences in behaviour can be accounted for by the different rules underlying them, and since new rules can be constructed for every previously unknown behavioural difference they can be multiplied *ad infinitum*. Yet, we do not have any other access to rules than through behaviour, hence no non-circular explanations are possible. Nor can we learn anything about the way rules become binding for individuals. If, on the other hand, institutions are patterns of behaviour rather than mere rules, then either representatives of different cultures cannot behave differently if they share the same institution, a premise that has been negated many times in the course of institution-building throughout transformation countries, or, if, defying this definition, they behave differently vis-à-vis a certain institution, then their different behaviour cannot be explained in terms of culture.

Culture as social capital. A conflation of culture and social capital contradicts the criterion of the irreducibility of culture. Taken in the meaning Coleman accorded it, social capital is a structural property, and any explanation in terms of culture qua social capital is thus an explanation in which culture only mediates (or even more accurately is merely a label for) a structural influence. The same is also true if we use the term social capital according to the meaning Putnam et al. ascribed it, with all the conceptual ambiguities commented upon earlier. On the other hand, if social capital is taken properly to mean cultural aspects, such as civic norms, values etc., then both criteria seem to be fulfilled, but the issue of the term's superfluity arises, since it becomes indistinguishable from culture.

Culture as civil society. Since an alliance between culture and civil society requires that culture be taken in the broader sense, including institutions and social structures, it is exposed to both preceding criticisms. As is the case with institutions-as-rules, one can invent as many cultures as there are different behaviours to account for them, but the central problem of how these differences can be explained by independently observable variables is left unanswered. The criterion of the irreducibility of culture is also clearly not met, for culture is redefined as a cultural-structural hybrid.

The discussion presented in this article intended to show that a good deal of work has yet to be done in the field of conceptual clarification before the instruments in the toolkit of research on economic culture are as efficient as they may be required to be in order to be put to use in analyses of economic transformation or any other ambitious purpose. The Bremen volumes have made a significant contribution to this endeavour by providing a rich variety of answers, however partial they might be, to the central questions of this branch of research. They are also highly inspiring owing to the manner in which they approach culture empirically and to the way in which they encourage an interdisciplinary way of thinking about the post-communist transformation of the economy and society.

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Władysław Adamski – Pavel Machonin – Wolfgang Zapf (eds.): ***Structural Change and Modernization in Post-Socialist Societies***
Hamburg 2002: Reinhold Krämer Verlag, 344 pp.

Edited by three distinguished European sociologists, this book offers a collection of contributions from the international symposium 'Structural Changes in Post-Socialist Central Europe and the Actual Challenges of Modernization', which was held in Prague on 11–13 May 2001 and was organised by the Institute of Sociology of the Academy of Sciences of the Czech Republic, the Warsaw Institute of Philosophy and Sociology of the Polish Academy of Sciences (IfiS PAN) and the German Social Science Research Centre Berlin (WZB). The aim of the symposium was to gain a deeper understanding of events linked to the transformation processes that Central European post-socialist societies have been undergoing in recent years. For the participants in the symposium, the transformation process – defined as the sum of fundamental non-violent changes of transitional character, which change the system of political, economic and cultural institutions and create new social relations – attracted analyses characterised by a distinct measure of scepticism and criticism, above all with reference to the concepts that had dominated transformational thought in the early 1990s, i.e. above all neo-liberalism.

The content of the publication is structured around the content of the symposium, and specifically around the two sessions it was divided into. The first section of the book – like the first session of the conference – is comprised of four national reports, each of which represents a single chapter: 1) The Czech Republic: Transformation and Modernisation (P. Machonin, J. Červenka, L. Gatnar, P. Kuchař, K. Müller, M. Tuček); 2) Hungary: The Outlines of the Transformation (Z. Spéder, Z. Elekes, I. Harcsa, P. Róbert), 3) The Polish Case: In Search of National Specificity (W. Adamski, W. Zaborowski, K. Pelczyńska-Nałęcz, H. Domański, A. Rychard, E. Wnuk-Lipiński); 4) The Case of Germany: Transformation through Unification (W. Zapf, R. Habich, T. Bulmahn, J. Delhey). The second part of the publication includes four chapters, which address the controversial issues that were discussed in the second session of the conference: The Social, Cultural, and Civilisation Effects of Transformation (K. Müller), The Questionable Blessing of the Modernisation Concept (E. Allardt), Is 'Modernisation' Enough? (J. Juchler), Transition, Transformation, and the Social Sciences: Towards a New Paradigm (F. Bönker, K. Müller, A. Pickel).

The authors of the Czech report took the theories of modernisation as their starting point. The data they were working with came largely from research projects on social stratification. The main themes in the report are as follows: changes in the character of work and occupational structure; changes in research, education and technologies; transformations of the systems of stratification of individuals and families; the standard of living; lifestyle; attitudes and socio-political value orientations. According to the authors of the Czech report, radical economic reform based on the adoption of methods recommended from abroad and on the application of a number of original Czech policies did not bring the anticipated economic growth and increase in living standards. Furthermore, it permitted and involved unlawful and immoral economic behaviour and extreme forms of economic and social differentiation, with which many citizens disagreed. Other accompanying features of reform included a number of failings in political life, rising crime rates and a low level of legal consciousness. The Czech authors argue that improvement in the quality of life, which is the fundamental point of modernisation, was not achieved to the expected extent, and that a number of unexpected risks and dangers also appeared. There is still a deep and yawning gulf between the half-modern and

half-wealthy Czech society and the model of an advanced post-industrial information society based on knowledge, as is clear from the way Czech society is lagging in such fields as science, research, development, technologies, the standard of living and lifestyle. The authors of the Czech report nonetheless stressed that it has not been their wish to create a caricature of a pitiable country that constantly complains and demands help from outside. On the contrary, they are trying to show that most of the difficulties listed arose out of the country's own errors and could therefore be effectively tackled by properly thought out progressive steps.

The theoretical framework of the Hungarian report is provided by the concept of welfare as linked to the problem of transformations of the social structure. As the authors point out, at the beginning of the 1990s it was already evident that, of the countries undergoing transformation, it was in Hungary that people were the least satisfied with the political and economic changes and 'nostalgia' for the previous regime was most widespread. At that time there was considerable disillusion apparent in Hungarian society as a result of economic difficulties, large-scale unemployment and growing inequalities in many different groups of the population. The changes could not be accomplished overnight, and this led to disappointment among those who had expected that democracy would enable them to increase their level of consumption and material standard of living. While the supply of goods on the market grew, among substantial sections of the population the possibilities of enjoying the kind of level of consumption people wished for actually diminished. The transformation into a market economy and political democracy brought high social costs. At the turn of the millennium, however, there were already grounds for believing that Hungarian society had overcome this difficult period. According to Hungarian sociologists, in 1999–2000 there were perceptible signs of improvement in many areas of social life. It had taken a decade before the general improvement in Hungarian society started to be reflected in the perceptions of individual citizens.

The Polish report focuses on change in the political system, which it explores in a more extended time frame, reaching back to the beginning of the 1980s. The authors of the report explicitly employ a structurally orientated theory of conflict as a conceptual guideline to interpret the development from the structural contradictions of the socialist system to its fall and subsequent transformation. Using empirical data the authors identify the structure of social conflict, its part in the fall of the system and in the subsequent course of the transformation of the system. The analysis conducted by the Polish sociologists is based on a long series of surveys known under the title 'Poles', which first started in the latter part of 1980 and continued in 1981, 1984, 1987/1988, 1990, 1995 and 2000. Using this data the authors distinguish between two main phases of the development of the society-wide conflict: a) the stage of selective rejection of socialism in the 1980s, and b) the stage of selective approval of capitalism after the political breakthrough of 1989). As far as the second, stage of development is concerned, the authors conclude that the Polish version of neo-liberal strategies of restructuring the post-socialist economy and especially the policy of shock therapy placed demands on society that were too great for them to be able to secure genuinely mass support among the population.

The basic perspectives explored in the German report are questions of welfare development and modernisation, which the authors consider to be the most important dimensions for an evaluation of the unification of Germany. The German sociologists rely mainly on data collected in the 'German Socio-economic Panel' project and the comparative survey 'New Democracies Barometer'. East Germany is a special case among the post-communist countries. Unification brought a number of undoubted advantages

for transformation, but also created a number of problems and unexpected side effects. The German authors' report confirms that, in some sections of East German society, the years 1990–1999 witnessed the appearance of certain crisis phenomena associated with changes in the social structure, manifestations of social inequality and unemployment. At the same time, however, the report shows that it has proved possible to reduce some earlier symptoms of anomie surprisingly quickly, and that East Germans are today generally more satisfied than ten years ago. According to the German sociologists, this is the result of successful 'catch-up modernisation', which has brought about quite a considerable improvement in material living conditions, civil and human rights, and the liberation of citizens from domination by the state and enforced socialisation. The authors argue that overall the unification of Germany has had better results than is generally believed, and consider the trend followed in East German society to be essentially the right one.

Apart from the four national reports the book under review includes four discussion papers of a mainly theoretical and polemic character. Karel Müller proposes the concept of reflexivity and reflexive modernisation as a more effective tool than the simplified concept of the transformation process. Erik Allardt draws attention to the need for a more precise definition of modernity and modernisation; in a critical spirit, he indicates that there is no single unified modernity, but multiple 'modernities'. Jakob Juchler sees a major methodological problem in the normative and evaluative approaches of the modernisation theory; one of his critical points is that the emphasis placed on the question of economic growth often marginalises the question of political relations. Frank Bönker, Klaus Müller and Andreas Pickel refer to the need for a new paradigm, which will shift the exploration of the process of transition and transformation towards cross-disciplinary approaches.

Overall it is possible to say that *Structural Change and Modernization in Post-Socialist Societies* offers a multi-faceted, theoretically well-grounded and highly informative view of the transformation of the post-socialist countries of Central Europe. Although the national reports were not produced in a unified way, according to some previously agreed method, and although they rely on quite different sorts of data, these texts nonetheless allow considerable room for comparison. They therefore give us an idea of what is common to all these societies in transformation and what is different and specific to individual countries in the actual course of the transformation process. The polemic tone of the book ought to ensure that it has a chance of catching the interest of readers internationally and provoking wider discussion.

Jiří Šubrt

Maxime Forest – Georges Mink (eds.):
Post-communisme: Les sciences sociales à l'épreuve
Prague 2003: CEFRES, Press Dokořán, 221 pp.

In the age of production, self-reflection in science is quite rare. Even if it is promoted by such personalities, for example, as Anthony Giddens, the project of self-reflection is mainly dealt with on a theoretical level, and less often really realised. For this reason, serious attention is warranted by the publication of the book *'Post-communism: a Challenge for the Social Sciences'* (in French), which reflects on the impacts that the social reality of the communist regime and the process of transformation in Central and Eastern Europe have had on development in the social sciences.

The collection of papers in the book stem mainly from a conference organised by CEFRES (French Centre for Research in Social Sciences, Prague) in March 2002 in Prague, on the occasion of the Centre's tenth anniversary. To complete the picture the edi-

tors decided to include also some articles that raise other questions, such as the role of gender in democratisation studies.

Beyond self-reflection the multidisciplinary approach permits an analysis of the relationship between the different disciplines that are present in the volume: anthropology, geography, economics, history, political science, European studies, sociology and gender studies. Also, the mixture of authors of different nationalities - French, Czech, Polish and Hungarian - creates a fruitful dialogue, especially between Western and Eastern reflections on the post-communist era.

Even though the contributions differ in terms of discipline, style or main focus, it is still possible to find many common topics. The introductory chapter, written by George Mink, previously director of CEFRES and a distinguished French professor of politics and sociology at Institute d'Etudes politiques in Paris, offers a very clear summary of the main problems dealt with in the volume. Two areas of problems can be distinguished: the first group addresses the challenges of transforming society that are discussed in the social sciences, and the second group deals with the status of post-communist social sciences as such.

Among the most discussed factors influencing the transformation process are the implementation of the free market system, the impact of international institutions and the process of accession to the European Union. Looking back, from today's perspective, it must be admitted that the papers pay primary attention to external factors, and only minor attention to research concerning the deeper, insider's look into everyday life, the change of values and behaviour.

In terms of paradigmatic approach, two are discussed most as relevant for the analyses of post-communist societies: transitology and the theory of path-dependence. Transitology represents a transversal concept, a unique trajectory drawn mainly from the experience of Latin-American countries, which assumes that the simple introduction of democratic institutions can lead to the restoration of democratic regimes (instant democracy). By contrast, other social scientists promote the path-dependency approach, pointing out the need to pay attention to the particularities of post-communistic countries. The majority of contributors conclude that unfortunately there is nothing resembling a new original paradigmatic approach to be drawn from post-communist analysis. Even if it is possible to find a great deal of creativity in the labelling and classifying of the new phenomena of post-communist societies, including interesting metaphors, a coherent new theory has yet to be formulated. Is this due to the large variety of post-communist experience, or is the obstacle embedded in postmodernist pluralism as such? This remains unanswered.

Finally, the authors have not forgotten to raise broader methodological-ethical questions. They agree that communist ideology has strongly affected the social sciences and that their emancipation from the past is not yet complete. Other questions, to initiate future debate, are also raised: what to do with communist archives, what is the role of the social sciences in the reconstruction of the past, what is the relation between science and politics and science and the media, what is the role of scientific expertise in the reconstruction of post-communist societies. Thus, the post-communist experience stresses, with a new urgency, general questions of scientific ethics.

In addition to the general topics and problems dealt with in the volume, its multidisciplinary character offers the possibility of comparison among different disciplinary approaches and traces their particularities. Although it is impossible to reproduce the vast content of the volume here, the main trends at least will be addressed.

The largest section is dedicated to sociology, represented here by Piotr Sztompka (Jagiellonian University in Warsaw), two Czech scientists, Miroslav Petrusek (Charles University in Prague) and Jiří Večerník

(Academy of Sciences, Prague) and Elemer Hankiss (Hungarian Academy of Sciences in Budapest). Piotr Sztompka reflects on the changes in 'Eastern' sociology in the larger context of globalisation, offering a very ambitious project for a general theory of social change. His very general and slightly normative approach may perhaps be considered an extreme reaction to the boom in empirical sociological studies about post-communist societies. This 'boom in numbers' lacks a unifying theoretical background and sociology then becomes public knowledge as pure statistics. Miroslav Petrusek offers an interesting, more personal view of the history of Czech sociology, covering also the normalisation era and its effects on recent sociological research. He mentions many positive changes in Czech sociology – the boom in translations of foreign literature, scientific and student exchange programmes, the emergence of a new sociological generation that is successfully integrating into the international scientific network. Nevertheless he describes the post-communist experience in rather a pessimistic tone, as a trauma of retarded science, which is still suffering from the long period of physical as well as mental isolation. Jiří Večerník, the main figure in the sociology of economic life, stresses the necessity to study social transformation as an interaction between two domains, social cohesion and the motivations of individual actors, and he criticises the absence of both a multidisciplinary and a long-term approach in Czech sociology. He asks whether the social sciences have not found themselves in a schizophrenic state – analysing social transformation during the process of their own transformation. In conclusion he offers a very instructive and systematic overview of comparisons between the classic economical approach and the socio-economic approach.

Political science is represented in a more diverse manner. Georges Mink focuses on the domain of French sovietology and the need for its conversion once its object of study had disappeared. On the one hand the collapse of the Soviet Union destabilised sovietology as such; on the other hand it increased the interest in more practical knowledge and specific expertise, and thus helped lead to the formation of new research centres and scientific journals, and opened up access to confidential documents. The actual topic of the relationship between political science and EU enlargement is addressed by Laure Neumayer (University of Paris-I Sorbonne). She suggests studying the scientific work about enlargement of the EU in the context of the impact of the preparation of candidates on the level of the political structure, while the political structure was at the same time undergoing its own transformation. According to Laura Neumayer the terms of consolidation and Europeanisation, used in the analysis, became normative, and this has had an impact on the character of recent social sciences. It is also interesting to notice that unlike sociologists, who seem to complain that more attention has been paid to external factors than internal ones, the political scientists, on the contrary, seem to criticise the lack of consideration given to external factors in the process of transformation. This again puts emphasis on the need for and fruitfulness of a multidisciplinary approach. Maxime Forest introduces an approach that is quite untraditional, both in the French and Eastern circles of political science, and he links democratisation studies to gender studies. He argues that the gender perspective in the study of social transformation has been often overlooked as being irrelevant. The practical requirement of resolving the problem of women's participation in politics in the new democracies forced political science to enhance this new perspective. The very dynamic development of the gender studies department at the Institute of Sociology of the Academy of Sciences of the Czech Republic was mentioned as an example of the successful achievement of this end.

The situation in economics is described by Bernard Chavance (University Paris VII Diderot), who offers a critical overview of

the theoretical approaches to post-socialist reality. He evaluates the clash between neo-liberalism and institutionalism, two mainstream paradigms, as a problem inherent to economics as such, namely the search for a balance between rapidity and efficiency. Even if the real experiences of transformation had influenced economic theory, Bernard Chavance does not see any evolution in the paradigm, just the return of institutionalism. But should we not at least refer to neo-institutionalism? If other social scientists have complained about the dominance of economic analysis of the post-communist transformation, Bernard Chavance critically reflects on the fact that the economic mainstream lost touch with the other social sciences and that a change of direction toward interdisciplinary communication is needed.

As regards historical science, Françoise Mayer (University in Montpellier, previously director of CEFRES in Prague) brings brilliant insight into the actual challenges of the Czech community of historians. She claims that, in comparison with other social sciences, the status of historical science was the most discredited by communism, as it occupied the role of legitimising the totalitarian regimes. At the time of the crisis of its own identity it was hard to satisfy the public demand that history be made clear. How to be objective and scientific when treating such a delicate question as, for example, collaboration with regime? A consequence of the fact that professional historians wanted to avoid denunciatory history and rather maintain silence, the public demand for simple answers was often met by amateurs, journalists and lay historians.

Even though the classification of geography among the social sciences may be viewed as unusual, especially in terms of the way East Europeans understand it, Marie-Claude Maurel (EHESS Paris) manages to present the case for the geographical approach as an integral part of social scientific analysis with great force. If the spatial dimension of social reality is considered, then spatial modification could reveal a great deal about the construction of national, ethnic or cultural identities. In contrast to the other social sciences, geography offers a more regional approach, which was up-dated with the entry of the post-communist countries into the European Union. Marie-Claude Maurel points out that the re-composition of the spatial matrix in Central and Eastern Europe has been mostly a spontaneous process, especially on the regional level, and lacking systematic change.

The key strength of this book lies in the fact that it has dared to deal with the very unpopular communist heritage still present in post-communist social sciences. It should be considered the beginning of a reflection on the mutual influences between the transformation of post-communist societies and the transformation of current scientific research. As the contributors have shown, the transformation did not relate only to the Central and Eastern European scientific arena, but also challenged Western social scientists. The volume undoubtedly introduces an impressive array of new information about the social sciences in the post-communist societies, and even attempts to formulate a more general hypothesis on the impact of the real social change in the social sciences. The multidisciplinary and international approach, especially the combination of French scientists and 'native' Central and Eastern European scientists, has facilitated the creation of a bright and vivid portrait. The most glaring problem with this book is at times the somewhat too sentimental and subjective evaluation of the post-communist period; but this is, in a way, quite understandable and will probably disappear from future reflections as the period moves deeper into the past.

To conclude, the book is an innovative, instructive and informative work that should be of great use and interest to a wide range of social scientists. The message of the book is that, 'Even if self-reflection is painful, it's a guaranteed means to move social sciences forward'.

Markéta Sedláčková

Charles Taylor: *Varieties of Religion Today. William James Revisited*
Cambridge – London 2002: Harvard University Press, 127 pp.

In his well-known essay *On the History and Systematics of Sociological Theory* (1967), Robert K. Merton gave five reasons for why social scientists keep coming back to the classics in their fields. One of them was "an improbable event: a dialog between dead and living" which, according to Merton, led not only to better internalisation of the cognised, but also, at the same time, contributed to formulating new questions based on the positive interference of ideas between the two authors. This is exactly what Canadian philosopher and sociologist of religion Charles Taylor accomplished when he 'meditated' on William James's more than a century old *Varieties of Religious Experience*. Rethinking this author's principal work is all the more relevant because James is undoubtedly, worldwide and otherwise, one of the most popular scholars on religion. It is his phenomenological rather than 'manipulatively psychological' grip on religiosity and especially religious experience that even today makes him a highly modern author, an author who has been undoubtedly 'trendy' since the beginning of the 20th century (*cf.* David M. Wulff: *Psychology of Religion*. New York 1997: Willey). All the more surprising then is how rarely James's work is mentioned in Czech religionist, philosophical and psychological discourse. Our psychologists of religion seem to be too preoccupied with deep psychology theories, de facto reducing a person to a subject of ontogenetically and phylogenetically conditioned intra-psychic processes (*cf.* most recently Pavel Říčan: *Psychologie náboženství*. (Psychology of Religion). Prague 2002: Portál), while phenomenologists and philosophers, traditionally looking down on psychology for this very reason, are seemingly unable to get over James's hastily assigned label of psychologist, and actually read him. However, William James preceded this, today considered unfortunate, particularisation of the humanities and the social sciences, and it is the inter-disciplinary nature of his interests that makes this work still relevant. 'James revisited' therefore helps us address some hotly debated issues in philosophy and the sociology of religion.

In the book reviewed here, Charles Taylor has not attempted the impossible task of summing up James's view on religion (more recent books on this subject to be recommended include Gay W. Allen: *William James*. New York 1967: Viking; Jacques Barzun: *A Stroll with William James*. Chicago 1983; D. Capps and J. L. Jacobs (eds.): *The Struggle for Life*. West Lafayette 1995: SSSR; Johannes Linschoten: *Auf dem Wege zu einer phänomenologischen Psychologie*. Berlin 1961: Gruyter). On the contrary, in the first chapter (pp. 3–29) he focuses on some of James's main points, while hinting at his limitations with regard to our (post-)modern reality. At the same time, he manages to show that while for James individual religious experience, and not institutionally mediated religiosity, was the key, often this individual experience is to a large extent formed by religious groups (pp. 7, 28). Yet we should not forget that Christianity (and other religions) guarantees redemption not only to 'religious virtuosos' but to all believers (p. 10). In other words, James's individualist view of religion, no matter how highly modern it seems, was too narrow; yet it was he, through this limitation of his, who significantly documented the very existential situation of modern society and its interpretation of relations between the individual and supra-individual entities. The limits to James's conceptualisation of (modern) religiosity are also dealt with in the second chapter, characteristically titled with a key Jamesian term as 'Twice-Born' (pp. 33–60). In addition to 'healthy-minded religion', or, a happy inner relationship with God, James also emphasised the other possibility for transcendent connection – the continual sense of one's own inadequacy and sinfulness, resolvable only through a second, spiritual 'birth', the prereq-

uisite to redemption. It must be pointed out that James not only heavily favoured this 'pessimistic' type of religiosity, but also covertly cited some of his own experiences in the book (p. 34). According to Taylor, such religious experiences motivated some other authors, e.g. Max Weber, or more contemporarily Marcel Gauchet (p. 41), to study religion. From the point of view of the sociology of religion, the fact of great significance is that James's widely discussed feeling of personal sinfulness among the followers of these 'sick-soul religions' constitutes one of the main streams that feed the massive spread of Pentecostal evangelicalism (p. 38), which, according to P. L. Berger and other authors, represents an important element of cultural globalisation (*cf.* Peter L. Berger, ed.: *The Desecularization of the World*. Washington - Grand Rapids 1999: EPPC + Eerdmans, pp. 37–49), while, for instance, in the African-American environment having been replaced by Islam (p. 39). In poetic terms, "James is our great philosopher of the cusp. He tells us more than anyone else about what it's like to stand in that open space and feel the winds pulling you now here, now there. He describes a crucial site of modernity" (p. 59). This leads to what M. Eliade later calls 'fear of history' or, in other words, the search for certainties based on religion (overtly or otherwise).

After some detailed explanation, in the third chapter Taylor gets to the point he wants to make, which is philosophical and sociological analysis of contemporary Euro-American religiosity (pp. 63–107), summing up that, although "more and more people are pushed on to the cusp that James so well described ... [it means] they don't add up the global vindication of James's idea of religious experience that they might be thought to at first blush" (pp. 63–4). Modern secularisation not only leads to the formation of more or less fundamentalist religious denominations (to what Taylor calls 'old-Durkheimism', referring to the classical theory of the social role of religious groups) or limits itself to transferring religiosity of a certain type to the ethnic, class or state entities (M. Juergensmeyer's 'ethnic religions' or R. N. Bellah's 'civil religion') that he calls 'neo-Durkheimian' (p. 78). Alongside these two types of religiosity the equally important 'post-Durkheimian' modus appears, based on 'expressive' individualism, which in turn has its origins in consumption and its transformations after the Second World War (p. 80). While in a traditional society, where belonging to a religious group and to society as a whole was the same, a person was born into the church (although there were also marginalised heretic groups and tolerated outsiders), and in the modern social structure people either chose their denomination and/or participated in a religiously or implicitly religiously anchored political entity, in our (post)modern world none of this necessarily applies. "The religious life or practice that I become part of not only must be choice, but must speak to me; it must make sense in terms of my spiritual development as I understand this" (p. 94) or, in other words, it does not have to be connected with any social group. According to Taylor, contemporary religiosity cannot be fully described in Durkheimian terms any more, because "the spiritual as such is no longer intrinsically related to society" (p. 102). On the one hand, this privatisation of religion leads to a massive spread of atheism and at the same time to more and more frequent shifts to non-Christian, mainly Oriental religious traditions; on the other hand, it stirs up reaction in the form of fundamental transformations of established churches trying to address this situation, like the Second Vatican Council, representing Catholics, or, for Protestants, a number of Charismatic movements (p. 107).

Taylor's description of the plurality and gradual privatisation of modern Euro-American religiosity (the author correctly realises it is not a global trend, p. 97), and of its fundamental interconnection with the economic and consumer sphere, in many aspects naturally corresponds with the earlier ideas of P. L. Berger and Thomas Luckmann. However, it is

in James that Taylor finds basic similarities in the perception of faith. Therefore, at the end of the book, Taylor asks to what extent James's prediction of modern religiosity was justified and, together with this psychologist and philosopher, he tries to go a little deeper than the scientific discourse of the sociology of religion 'allowed' Berger and Luckmann. As a philosopher – or, to use the metaphor I started my review with, as a pair of philosophers in fruitful dialog – he can afford to do so. And that's where Taylor's strength lies. Taylor concludes his thought saying that William James was undoubtedly right that religious experience of a certain type is a key phenomenon of our era, but, together with the above-mentioned sociologists of religion, James wrongly believed in its strict individualisation, though it eventually led to the concept of religious de-privatisation (P. L. Berger: *Desecularization*, pp. 1–18; José Casanova: *Public Religions in the Modern World*. Chicago – London 1994: University of Chicago Press, pp. 211–34). "In a post-Durkheimian world, this allegiance [= piety] will be unhooked from that to a sacralized society (paleo [Durkheimian] style) or some national identity (neo [Durkheimian] style); but it will still be a collective connection" (p. 112). That is exactly why there is de-secularisation going on right now, as many people are finding existential security through various (more or less) unorthodox religious groups; for this very reason, implicit 'neo-Durkheimian' religiosity is still alive, along with its many abused forms (Taylor explicitly mentions the war in Yugoslavia and the *BJP* in India, p. 115). Finally, it is the very attempt to retain this highly religious experience that leads each one of us, regardless of any 'personal' faith, to religious institutions that enable this (pp. 111–116). According to Taylor, (post)modern religiosity arises in a 'post-Durkheimian', typically Jamesian experience of faith, yet it soon strives to become formally institutionalised, although it is nowhere stated whether and to what extent this institutionalisation must conform to established religious tradition. 'Jesus in Disneyland' (David Lyon) is one of the many forms of modern faith that are clearly neither completely Christian nor completely inconsistent with Christianity.

In a way, this exquisitely written book, which this review is meant to draw attention to, does not really bring us anything new: many of the important considerations of modern religiosity that Taylor came up with through his 'dialogue' with William James are well-known from the works of modern sociologists of religion. Yet there is another aspect of Taylor's book, which makes it a truly brilliant and inspirational analysis – the book's methodology. Through his encounters with James, the author showed us that a pregnant articulation of key social and scientific problems does not necessarily have to be achieved through strictly scientific analysis but can also be done so using a philosophical speculation of sorts, providing it is able to maintain its relation to science (in this case the sociology of religion). This philosophical-scientific co-operation in widely varied fields is a long-term goal of the *Institut für die Wissenschaften vom Menschen* in Vienna, where Taylor's book originated. Pointing out the possibility of the often very fruitful connection is especially significant in Central and Eastern Europe. The problem is that the Marxist 'scientification' of the social sciences has so torn this connection and devaluated its results that even today it is not considered natural or even possible. That is not to say that in the context of the sociology of religion we should give up the standards of science or that religious experience alone will lead us to religious studies; rather it is to point out the fundamental mutual benefits of both the scientific and the philosophical-theological approach to religiosity if both sides take each other seriously enough and at the same time are aware of the limits of either approach. Taylor's book *Varieties of Religion Today* is a perfect example of the plausibility of such a synthesis.

Zdeněk R. Nešpor

Caroline Humphrey: *The Unmaking of Soviet Life: Everyday Economies after Socialism*
Ithaca 2002: Cornell University Press, xxvii, 265 pp.

To speak about the transition of post-socialist countries as its neo-liberals designers have would be a cruel irony. The case of Russia is an example of a laissez-faire failure par excellence – the traffic jam of Muscovite Mercedes registered by a World Bank economist notwithstanding. The readers of Caroline Humphrey, a 'founding mother' of the anthropology of socialism and post-socialism, will not be surprised. Her work has provided readers with reasons for scepticism about the adequateness of the great narrative of neo-liberal globalism. Humphrey's accounts of (post-)Soviet reality have conveyed the message, 'the history is present and here to stay'. Indeed, the failure of the one-size-fits-all prescripts of shock therapy was overdetermined. The outcome of transformation policies has been shaped not only by the design of the policies as such but also by the inherited conditions, meanings, interpretations, expectations, and strategies.

One of the few non-Soviet scholars with substantial field experience in the former Soviet Union, Humphrey became famous for her *Karl Marx Collective: Economy and Society in a Siberian Collective Farm* [Cambridge: Cambridge University Press, 1983]. Based on her first trip to eastern Siberia in 1967 and a later visit in 1975, this magisterial study depicts the surprisingly rich Soviet reality in Siberia. She describes the *kolektiv* enterprise 'Karl Marx', which managed to achieve seemingly unrealisable goals by exploiting the possibilities offered by the language of the socialist era.

Her most recent publication, *The Unmaking of Soviet Life*, is a selection of essays in economic anthropology from the hectic decade between 1991 and 2001. The chapters of the book were "written as events were taking place" (p. xvii). The collection provides a "chronicle of the dismantling Soviet life that at the same time has brought about many new kinds of activity and new rationales" (p. xvii).

The volume is organised into three parts. In part I, 'The Politics of Locality in an Unstable State', Humphrey utilises Appadurai's notion of 'localities' (people's own worlds of values) to analyse the social and symbolic dislocation produced by the disintegration of Soviet institutions and by volatile prices. The main message she wants to convey is that in post-socialist Russia the 'economic' and the 'political' remain deeply entangled and that the Russian political economy on all levels, from household to society, implies also a moral economy. It "reifies social boundaries and stigmatizes those cast outside" (p. xxii). The disruption of the old protective institutions has led to the unfolding of new forms of resource protection, such as the mafia, and has reinforced neo-feudal patron-client relations. While it strengthened the power of managers, who control both production and distribution, privatisation left the social relations of production intact. Humphrey illuminates the complex rationing system of coupons, talons, and orders that made people fatally dependent on the all-encompassing workplace. They had no money to trade outside and the majority of services were provided at the workplace. The autonomy of enterprise has been further reinforced by the intricate economic system, based largely on barter in the absence of any state regulation of exchange. Thus, a system has emerged that is based on particularism and trust. This has created favourable conditions for the existence/operations of the mafia and other protective institutions. The system is quite popular among those who are involved, since most people think they can gain from it. However, being excluded from the system becomes a disastrous problem. Humphrey dedicates a chapter to the fate of those not involved and describes one semiological battle: the mythical constructions of 'the dispossessed' and Russian polity. Humphrey concludes the first part with an ac-

count of the moral economy of consumption in Moscow of the early 1990s. She establishes a temporal connection between the present patterns of spending and the constitution of consumption under the Soviet regime. The actual practice is driven by value-laden perceptions: the experience of deception, the exposure to global values, and the projection of moral ideas concerning the political economy.

The second part, 'Strategies beyond the Law', explains how new categories of actors and activities have exploited the frontier space of the gaps between local polities, such as provincial republics, provinces, or cities. It also reveals the structural and cultural mechanisms which reflect and reproduce crucial elements of Soviet and pre-Soviet society, while simultaneously dismantling or radically reconfiguring them. The first essay in this section classifies the categories of social actors and the peculiar institutions engaged in trade. The values and representations through which people understand the world occupy a crucial role in Humphrey's explanation of forms of mass trade and economic action; hence her elucidation of why the interstitial activity of mobile traders is regarded with suspicion and seen as creating disorder. The chapter that follows depicts the cultural world of racketeers – people who use the threat of force to extract profits from any weakly protected resource. The racketeers create parallel relations of power within and beyond legitimate institutions. While acknowledging the functionalist explanation of the structural role that the racketeers play in the absence of state regulation of property relations, Humphrey focuses on the historical dynamics of these phenomena. She distinguishes "the structure of the racket from the values, symbolism, and legitimacy attributed to it and from the social production of the kinds of persons who engage in it" (p. 101). 'Rackets' are culturally distinctive groupings which use techniques that evolved out of the earlier Soviet context. The final chapter of the second part offers a refined description of the processes and complex meanings that in the Russian context are designated with the umbrella term 'bribery'. She shows how the meaning and practice of bribery is situated in networks of 'collectivities' and structured according to class.

The last part, 'Rethinking Personhood', contains four chapters that deal with the politics of identity in the post-Soviet space and with individual coping strategies. It examines the ways people constitute and examine personhood and morality in everyday life. The opening chapter is a textbook example of an outstanding 'thick description' of the author's trip to a new shrine in Mongolia. It examines the issues of trust, theft, conscience and the human relation to nature. The chapter on villas of the 'New Russians', the people that made a fortune in the new economy, also deserves to be mentioned. It analyses their material culture in order to provide a portrait of this peculiar class and to depict the difficulties, subversions, and disputes surrounding their identity.

The Unmaking of Soviet Life is a collection of essays, each of which has its own history. It is therefore understandable that the volume lacks a single analytical strategy. Nevertheless, it is possible to trace the underlying analytical logic of Humphrey's inquiry. Influenced by Foucault and Gramsci, Humphrey's main point of focus is the dynamics of power in everyday relations and in economic activity in particular. Her analytical strategy employs three methods of inspection simultaneously. First, she provides a close and readable description of the details of everyday social practices in Russia. The author helps us to comprehend or at least take a look inside the post-Soviet social reality. She achieves this not only by the providing us with unique data, but also by turning the data into theory. Second, her principal method of explanation is the interpretation of the way in which people conceive general social configurations, the ways in which social actors represent the social practices that

they experience or observe. For Humphrey, culture is not primarily theoretically important as a constraint that prevents the achievement of desirable goals (e.g. generalising the market or establishing democracy); instead, it is important as the capacity to enable – it is culture that allows actors to think, speak, and act. As a primary point of focus, meaning makes space "available to individuals to take particular decision among a range of conceivable actions" (p. xix). Humphrey has thus has heard Verdery's call to fill in the gap in post-socialist studies – and to theorise on the production of meaning [Verdery 1991. "Theorizing Socialism." *American Ethnologist* 18: 419–439.]. Her theoretical interest prevents us from falling under the influence of the 'new orientalism' in our approach to Russian social reality (e.g. the complex umbrella-concept of 'bribe' that is often misunderstood by outsiders). Moreover, *The Unmaking of Soviet Life* develops the reader's understanding of the very meaning of such basic terms as money, profit, and (economic) motive, which have a peculiar sense in the post-Soviet context.

When explaining the structure of meaning, Humphrey employs a third method of inspection, the discernment of historical roots and wider structural contexts of practices. Humphrey's theoretical emphasis on path-dependency, which her work establishes with convincing empirical evidence, makes a strong case against the popular teleological notion of the post-communist transition. Despite this temporal analytical primacy, Humphrey does not fall into the intellectual trap of persistent historical overdetermination, an extreme expression of which is the notion of (post-)socialism as a form of Oriental (read also as non-Western) despotism. On the contrary, she is well aware of the causal power of structural factors and the theoretical importance of recent policies. Thus, for instance, she describes how the actions of the state have created niches, which racketeers are able to exploit. Similarly, her manifest focus on images and meanings is actually much broader, given the importance she assigns to the structural factors in her analysis.

The intentional avoidance of 'big' abstract concepts that, apart from ideological utility, have not proved to have much analytical or theoretical strength (e.g. civil society) is one of Humphrey's virtues. Yet, her analysis is not at all a-theoretical; on the contrary, it is a dialogue and critique of many theories of post-socialist transformation. Nevertheless – and this is my main objection – this critical dialogue is too often only implicit; it lacks a more explicit connection to the discourse of social theory. This is certainly a pity, as Humphrey has a strong case to make. My explanation is that this limitation represents the main divide between anthropology and sociology: a stylistic difference. Despite the stylistic affiliation to anthropology, Humphrey's work demonstrates the poverty of the sociology-anthropology distinction – it is neither sociology nor anthropology but a *social analysis* at its best.

Jan Drahokoupil

Martin Myant: *The Rise and Fall of Czech Capitalism*
Cheltenham – Northampton 2003: Edward Elgar, xv, 288 pp.

The road from a "backward and inefficient centrally-planned economy into weak, unstable and inefficient market economy" (p. 262) is how Martin Myant describes the Czech transformation. Readers of the book will find a good deal of well collated information and essentially a comprehensive summary of everything that went on in Czech politics and in the economic policy of the Czech government in the years 1990–2002. The publication can serve not only as a handbook but also as a challenge to a deeper understanding of the past development and the current situation.

In a sense, the introduction to the book is better than the conclusion. It makes a variety of promises, the best of which is that the author intends to reveal the 'unspoken' programme that has remained hidden within the domestic transformation. According to the author it is this programme that everyone follows, even if they may be saying otherwise. Anyone living in the Czech Republic in recent years will suspect this must be true, as politicians say one thing and do another. While various projects collapse, there is no downfall of the country. There must be some deeper truth that lies behind this.

Myant offers an impressive summary of the 'mistakes' and 'successes' of the Czech transformation, which in his opinion featured six serious errors. The first was the federal government's 'shock therapy' at the beginning of 1991, which liberalised the economic environment, introduced a freely convertible Czech currency, and tried to sustain inflation. According to the author, this shock jolted the confidence out of Czech managers and also led to long-term damage in some branches, such as science and housing construction.

A lesser fault was the attempt by the central bank to maintain the currency restriction even in the ensuing years and not allowing businesses to catch their breath. The third mistake was the privatisation strategy, which did not bring any new resources to businesses but instead led to the banks being stripped of their assets from within. The fourth mistake was made by the government when it tried to maintain a state influence in the large banks. The fifth was that the transformation was not accompanied by a good legal framework, which prevented bankruptcies and also led to major fraud. The sixth reproach is directed at the evident effort made by the Czech government to divide up industry exclusively among Czech owners.

On the other hand, the transformation was aided by its good geographical location, which facilitated rapid co-operation with Western countries. The influx of investors was automatic and exports did not have to send their goods far. Traditional institutions also helped the Czech Republic. While there was a good deal of disorder and corruption, at least the central bank and the courts managed to respond adequately to the situation. The ability to learn from the ongoing crisis saved the Czechs from falling into chaos when the economy went into recession in 1997. In the end even the growing willingness to admit foreign investors helped the transformation.

Myant summarises elegantly, but he mostly refers to matters which are already known and have been described – that coupon privatisation, the sustaining of semi-state banks and the Czech path in industry were mistakes is something that surely no one today doubts, except perhaps the authors behind these strategies. The author adds a couple of thoroughly documented examples. He may be thanked for putting together case studies recalling all the biggest failures in the Czech privatisation process – the story of Chemapol, Škoda Plzeň, ČKD Prague, individual banks and the metal industry. He acknowledges the success of the automobile industry, but energy, coal mining, the insurance sector, and the electronics industry are missing.

Published in 2003, the book may be reproached for the fact that it does not include any detailed information beyond the end of 2000. The author provides a very praiseworthy description of the careers of a number of dubious figures in business, like Soudek of Škoda Plzeň, Junek at Chemapol, or Stehlík at Poldi Kladno. However, he mentions Babiš, who in 2001 was trying to purchase Unipetrol, as an honest business person and workaholic, despite the fact that he was involved in some less transparent privatisations. The author considers the American company Appian, which bought Škoda Plzeň, as a normal foreign investor, although it is in fact a Czech company that is only formally registered in the United States.

Of course, Myant cannot know all the details, but he should not substitute his lack of knowledge with fabrication. When, in the end, he describes the case of the privatisation of Unipetrol as the inability of the state to hand the purchased property over to Babiš, he has strayed seriously away from reality. The author does, for example, correctly point out that the Czechs were not aware of the bad reputation of Nomura when they welcomed the entry of this Japanese investment bank into the Czech semi-state IPB Bank. But then he does not mention that the managers at IPB were responsible for the majority of bad deals long before Nomura bought the bank.

Alongside such missing details the author also overlooks some substantial factors that influenced the way the economy evolved. For instance, he ignores the indirect influence of foreign capital and institutions. A more detailed analysis would show how significant the influence of foreign banks was on some of the cases he describes. The industrial empire of Soudek, one prominent business figure, came to an end when he ceased paying credit instalments to German banks. The death knell for IPB came with the publication of an evaluation of the bank in *Handelsblatt* several months before the Czech government again nationalised the bank as it fell into bankruptcy.

Myant describes how the Zeman government supported the entry of foreign investors. But he does not refer to the ambitious projects of government investment that led to massive corruption and facilitated the rise of the new Czech business elites, who are partly replicating the route taken by Soudek, Junek and Stehlík, albeit in different circumstances. The unsuccessful model of the Czech path has thus been modified and it is only possible to speculate about whether the new attempt will or will not be a success. At the general level the author is aware of the limitations in his analyses and repeats common evaluations of the Czech transformation – too strict currency restrictions, negative role of privatisation funds, unsubstantiated confidence given to Czech managers.

The 'unspoken' programme in the Czech transformation is hard to understand for foreign analysts. It is not possible to evaluate the socialist economy as though it were an economy just lacking some elements proper to the capitalist economic system. The socialist economy emerged out of a complete reversal of the former capitalist system, while employing at the same time a number of elements proper to the wartime economy, which survived up until the end of the 1940s. The socialist economy was made up of its own substance and this did not simply vanish at the end of the 1980s.

Robert Putnam's studies should be recalled here. The American sociologist pointed out that in addition to the best possible social order there is also the 'second best' – when civic and market principles are replaced by clientelism as in southern Italy. Such a system allows the inhabitants of southern Italy to earn and survive, albeit under less favourable conditions than in northern Italy. It is however illusory to assume that Sicilians would give up their traditional strategies, even if all of the Italian south would agree that clientelism and the mafia are bad. Sure, the Czech Republic is not southern Italy, but networks and rooted habits are very resilient too.

The Czech transformation, like the other post-communist reforms, rejected the socialist economic system, but people did not abandon their habits. They bravely threw themselves into new experiments, which they thought would introduce capitalism, and understandably these paths were ones of trial and error. At the same time, however, the new elites established their positions by means they were accustomed to from an earlier period. Investigating the dynamics of this kind of development requires above all thorough case studies, some of which are provided in Myant's book; many others were provided – but are still to be expected – from local observers.

The book by Martin Myant is in any case

an honest and valuable effort, and therefore it provokes many important questions. What helped most to increase the equality of Czech production during the transition? Under what circumstances can a 'socialist manager' achieve success in reborn capitalism? Why were only some industrial branches successfully transformed, particularly automobile production and electronics? How does corruption and political clientelism decrease the performance of the Czech economy? How do government investments and the state administration of some enterprises benefit the economy? It is only a pity that there are few – if any – contributions to the debate on the part of Czech economists comparable to Myant's study.

Petr Holub

The Library of Sociology

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Is open and offering its services to the public as of 20 April 2004

The Library of Sociology first emerged as a department within the Library that was part of the Institute of Philosophy and Sociology of the Academy of Sciences of the Czech Republic. That Library was destroyed by the floods that occurred in the summer of 2002. After a long period of reconstruction devoted to trying to replace the huge losses to the collection caused by the floods and rebuilding the library spaces on the ground floor of the building occupied by the Institute of Sociology AS CR on Jilská ul., it has finally become possible to construct and open an independent Library of Sociology, thanks especially to the numerous gifts and donations from domestic and foreign institutions and private citizens. The Library of Sociology has been conceived as a modern specialised library and is intended to serve the needs of researchers, students and the academic community on the whole. Gifts and donations to the continued rebuilding of the library are welcome. A publication has been issued describing the construction process behind the development of the independent Library of Sociology, from the time of the floods up until its celebrated re-opening on 19 April 2004.

Where to find us?

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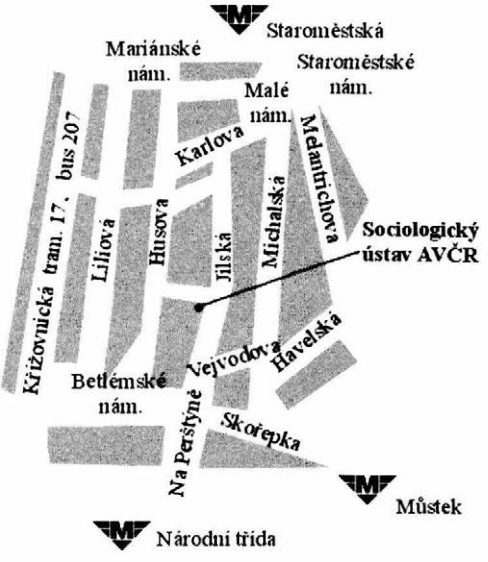

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A Research Colloquium in Honour of JUDr. Michal Illner on the Occasion of His 70th Birthday

On Thursday 27 May, a group of friends, former and current colleagues, and other researchers met in the beautiful Villa Lanna to discuss the research topics that form the lifelong subject of the professional interest of Dr. Michal Illner, the former director of the Institute of Sociology, whose 70th birthday was the key reason for the event. Although the main reason why the Institute of Sociology of the Academy of Sciences of the Czech Republic organised the colloquium was quite personal, the participants did not refrain from using the opportunity to provide valuable scientific insights into various topics that were parts of the colloquium's official subject matter. Overall six presentations were made, followed by fruitful discussions.

Tomáš Kostelecký, a senior researcher at the Institute of Sociology, devoted attention to the role of political parties in local politics in the post-communist Czech Republic. He described the process of party emergence on the local level after 1989, which was replaced by the gradual disappearance of parties from the local political scene. Although political parties actively have used their powers to change the electoral laws relating to municipal elections, they have been unable to prevent independent candidates from replacing them in the majority of small municipalities in the Czech Republic.

Martin Hampl, a professor of geography at the Faculty of Science of Charles University, described the post-communist development of Czech society from the point of view of a human geographer. He analysed the changes in commuting patterns, internal migration and the recent development of settlement structures. The process of the spatial concentration of settlement has gradually been replaced by the concentration of jobs, and after that by the process of the concentration of jobs in tertiary sector. The most recent trend is the concentration of the influence and power of cities. The largest metropolitan areas in the Czech Republic may not be growing in terms of population, but their influence and power is growing substantially.

František Zich, a professor of sociology working at the Institute of Sociology, devoted his presentation to the selected issues connected with the formation and the recent development of Euroregions in the Czech-German border regions. He analysed factors that influence the institutional performance of individual Euroregions, and described recent changes connected with the entry of the Czech Republic into the European Union.

Both Lubomír Falťan, the director of the Institute for Sociology of the Slovak Academy of Sciences in Bratislava, and Milan Turba, Director for the Strategic Planning City Development Authority Prague, focused on recent changes in the capital cities of Slovakia and the Czech Republic respectively. It was clear from the comparison that both cities have undergone the same type of processes, which have led to similar changes to socio-spatial structures. The functions of different city parts, specifically the historical centres and the commercial suburban zones, have tended to change substantially.

Professor Jiří Musil, urban sociologist, and the first post-communist director of the Institute of Sociology, allowed himself to depart from both his professional field of interest and the overall topic of the colloquium and devoted his presentation to the role of friendship in contemporary societies. Friendship, he argued, is becoming more important in societies in which traditional interpersonal ties within families are declining. His presentation broke the ground for Michal Illner's presentation, titled 'My Socio-spaces'. This presentation carried the audience into the second, non-scientific part of the day, which was the celebration of Michal Illner's birthday.

* * *

JUDr. Michal Illner was born 19 May 1934 in Prague. He early became interested in the social sciences. However, the situation in 1952, when he finished secondary school, was very unfavourable for a man who did not want to co-operate with the communist regime while studying society. Michal Illner solved the dilemma of the conflict between professional interests and available options by deciding to study at the Faculty of Law. After his graduation in 1956 he left Prague and worked for several years as a company lawyer. Later, he also served in different functions in various industrial companies. The East–West détente, followed by limited liberalisation of the Czechoslovak Communist regime in the 1960s provided Michal Illner with a chance to become involved in social science research. In 1965 he joined the Department of Methods and Techniques in the newly established Institute of Sociology of the Czechoslovak Academy of Sciences.

His scientific career at the institute soon started developing in a very promising way. In 1967 he spent some time at Zentralarchiv fur Empirische Sozialforschung in the German city of Cologne. In 1968 he passed the higher examination in Administrative Law at Charles University and obtained the title of JUDr. (Iuris Utriusque Doctor). The invasion of Soviet troops into Czechoslovakia in August 1968, however, had a deep influence on Michal Illner's professional life. Although he was allowed to go through with his already planned stay at the Bureau of Applied Social Research in New York (1969–1970), his career development was seriously damaged immediately after his return. His non-ideological research topic, 'social indicators', allowed him to remain at the Academy of Sciences, but he was not allowed to defend his already written doctoral thesis. During the 1970s and 1980s Michal Illner lived in a sort of 'internal emigration'. He concentrated on research topics that were connected with communist ideology to the least possible extent, such as social indicators and social statistics. His research interests also broadened in the direction of social geography and demography.

After the Velvet Revolution in 1989, Michal Illner applied his expertise and joined in with the people who were helping to rebuild sociology as an independent scientific discipline within the Academy of Sciences. He established a department that began studying local and regional aspects of social transformation. His research interests connected sociology with demography and human geography. He was appointed vice-director of the Institute of Sociology in 1990 and later (1993–2001) served for eight years as the director of the Institute. In addition to his managerial and administrative responsibilities he was still able to continue in his scientific work. He published a large number of articles in both domestic and foreign scientific journals. The list of chapters he has contributed to edited books is even longer. Michal Illner has also led several research projects, and is co-editor of the books *Changing Territorial Administration in Czechoslovakia* (1992), *Local Democracy and the Processes of Transformation in East-Central Europe* (1996), *Central Europe in Transition: Towards EU Membership* (2001), *Local Democracy in Post-Communist Europe* (2003). Owing to his position within the scientific community he has served in many other important posts – he has been a member of Standing Committee for the Social Sciences of the European Science Foundation and a member of the Core Group of that Committee, a member of Board of Research Committee 05 'Comparative Studies in Local Government and Politics' IPSA, the Chair of the Commission on Sociology of the Grant Agency of the Czech Republic, and a member of the Scientific Council of the Academy of Sciences of the Czech Republic.

Despite the large number of Michal Illner's various duties he has always devoted a good deal of his time to students. Since 1990 he has been lecturing at the Department of Human Geography and Regional Development at the Faculty of Science of Charles University. Since 1992 he has also been

teaching students of sociology at the Faculty of Social Sciences. He is a very popular teacher. Students are perhaps capable of recognising more quickly than others what kind of person is standing before them and they appreciate the personality of the teacher as well as the quality of the lectures themselves. We, the colleagues of Michal Illner who have had a chance to work with him for a longer period of time, can confirm the students' observations. We wish Michal Illner much professional and personal success in the years to come. We hope that we will have many opportunities to continue to meet with him as scientist, teacher or simply a human being. He is the sort of true gentleman that is quite rare nowadays.

Tomáš Kostelecký

Czech-Slovak Sociology Days in Prague

Czech-Slovak Sociology Days was a three-day conference held in Prague on May 10–12 at the Vila Lanna and at the Library of Sociology of the Institute of Sociology AS CR. The organisers of the conference were the Institute of Sociology of the Academy of Sciences of the Czech Republic, the Institute for Sociology of the Slovak Academy of Sciences, and the Masaryk Society of Czech Sociology. The aim of the conference was to contribute to strengthening Czech-Slovak co-operation in the social sciences. Several meetings ran simultaneously at the conference, including a meeting of sociological societies from both countries, a meeting of representatives from academic journals published in the Czech Republic, Hungary, Poland and Slovakia and a meeting at which scientific publications published by the research institutes and other materials were presented to participants. The event provided ample space for closer discussions between institutions from the two countries. The programme of the conference was structured as outlined below:

Thematic Blocks:

Social Structure (chaired by Milan Tuček, SOÚ AV ČR)

Infrastructure of Research (chaired by Jindřich Krejčí, SOÚ AV ČR)

Regions and Local Politics (chaired by Peter Gajdoš, SÚ SAV)

Family and Gender (chaired by Alena Křížková, SOÚ AV ČR)

Public Policy (chaired by Zuzana Kusá, SÚ SAV)

Citizenship (chaired by Monika Čambáliková, SÚ SAV)

Which Methodology in Contemporary Sociology? (chaired by Hynek Jeřábek, FSV UK)

Public Opinion Research (chaired by Adéla Seidlová, SOÚ AV ČR)

Programme for the Future (chaired by Michal Illner, SOÚ AV ČR)

Other Items on the Programme Agenda:

A meeting of the Masaryk Society of Czech Sociology and other sociological societies (chaired by Jiří Buriánek, FF UK)

A meeting of doctoral students (chaired by Petra Rakušanová, SOÚ AV ČR)

A meeting of departments (chaired by Jiří Buriánek, FF UK)

A meeting of editorial personnel from the sociological journals (chaired by Marek Skovajsa, SOÚ AV ČR)

Abbreviations:

FF UK – Faculty of Philosophy and Arts of Charles University, Prague

FSV UK – Faculty of Social Sciences of Charles University, Prague

SOÚ AV ČR – Institute of Sociology of the Academy of Sciences of the Czech Republic

SÚ SAV – Institute for Sociology of the Slovak Academy of Sciences

The conference was met with considerable interest – the figure of 116 registered partici-

pants exceeded original expectations by the event organisers. In addition to researchers from the organising institutions others participating in the conference included researchers from the Faculty of Philosophy and Arts of Comenius University in Bratislava, the Faculty of Social Studies of Masaryk University in Brno, the Faculty of Philosophy and Arts and the Faculty of Social Sciences of Charles University in Prague, the Faculty of the Humanities of Trnava University and members of other research and teaching institutions from both countries. In attendance were representatives from the boards of each of the two academies of science. There were also a large number of doctoral students at the conference.

The individual thematic blocks were allotted a relatively short period of time, between 1.5 and 2 hours, which made it impossible to focus on any particular study in great depth. But it met the aim of overcoming the barriers to communication between researchers. Although Czech and Slovak sociologists often know one another personally, their knowledge of one another's projects and research results rarely goes beyond the more narrowly defined area of the research interests of the individual. Although there exists a long tradition of joint research between the two countries, a similar institutional organisational structure and a similarity of languages, after the division of Czechoslovakia the amount of co-operation between Czech and Slovak researchers seriously waned, along with any interest in such co-operation. While colleagues from Czech and Slovak research institutes began then to meet one another in international projects, purely bilateral co-operation fell by the wayside.

The continuing transformation of the scientific sphere in both countries and the shared issues of integration into the European research space have now evoked a new wave of demand for Czech-Slovak co-operation. Shared interests are surfacing with increasing frequency. On both sides of the border similar problems are being addressed in the area of the institutional and financial infrastructure of research. Moreover, mutual support between Czech and Slovak researchers in participating in international research projects within the programmes of the European Union may present them with a significant advantage. Last but not least, the unique relationship shared by the two countries and their societies and its transformation over time represents a rich source of important research subjects for comparative study.

In all aspects indicated the conference produced a good deal of more or less concrete outcome. Among the results, for example, are intentions to organise future joint conferences, with plans of this type emerging in the thematic block on Family and Gender and in the meeting of the sociological societies. Agreements were also reached on exchanges of information about research projects, on an exchange of publications and published work, on establishing co-operation between departments in organising study programmes, and on organising student and teacher exchanges between the countries and for the purposes of organising lectures by guests from abroad. There were discussions and a sharing of experiences in relation to specific international projects within EU programmes which involve Czech and Slovak participation and in relation to projects that form part of the ISSP international comparative study and the European Social Survey.

Representatives from the *Polish Sociological Review, Sociológia/the Slovak Sociological Review, Sociologický časopis/the Czech Sociological Review* and from the Institute of Political Science of the Hungarian Academy of Sciences discussed the possibility of setting up a new, Central European review of sociology.

The meeting of doctoral students from various universities and research institutions in the field of sociology and other social sciences (e.g. political science, demography

etc.) offered an interesting view of both the conditions surrounding doctoral study and the participation of doctoral students in teaching and research. Various possibilities for study abroad and for financing research projects were discussed. The main target of the students' criticism however was the lack of possibilities for financing doctoral research projects at some universities.

The contribution the conference made to the field stemmed from more than just the positive results from the discussions between institutions and researchers. The presentations were also intended for a broader audience and offered comprehensive information on the breadth and depth of the concepts of research in the individual fields in both countries, and on project research, publications and data files, which individual participants at the conference are able to access and use in their own research. A publication on the conference proceedings is being prepared. A detailed programme, further information on the course of the conference and materials gathered from the conference presentations in the individual thematic blocks are available in electronic format at the following web address: http://www.soc.cas.cz/cssd

Jindřich Krejčí

The History of Czech-Slovak Mutual Relations

Czech sociology and Slovak sociology have been influencing one another for more than a century and continue to do so today. However, to date this relationship has always been considerably asymmetric. For Slovak sociology, Czech sociological thought was very often not only a source of inspiration but also a direct influence, and it frequently served to mediate the introduction of theoretical initiatives from around the world. Conversely, the influence of Slovak sociology on the Czechs has been relatively minor.

Even the very beginnings of Slovak sociological thought were directly initiated from the Czech lands and were associated with the name of the classic Czech sociologist, T.G. Masaryk. It was Masaryk who at the turn of the 20th century was directly behind the emergence of *Hlas*, the journal around which gathered the young Slovak, liberally oriented intelligentsia. Masaryk inspired the *Hlas* movement's liberal and modernising project for Slovak society, the by-product of which was the promulgation of sociology. From this perspective, Masaryk's contribution to the institutionalisation of sociology in Slovakia seems to have been under-appreciated to date. The *Hlas* movement played a key role in the early stages of sociology in Slovakia, not only in terms of promoting the subject matter itself, but also in terms of people – as individual figures from the *Hlas* movement eventually established themselves as important Slovak sociologists. One such example in this connection is Anton Štefánek, the first Slovak professor of sociology.

It was through Masaryk that the classics of sociology were first introduced and spread in Slovakia and sociology became a science that was intended to aid and guide the process of Slovak national self-determination. Masaryk tried to give direction to this process with a project for 'Czech-Slovak reciprocity', and later also with the construction of a unified Czechoslovak nation, which was understood primarily in political-territorial terms. While in the end this attempt failed, and independent Czech and Slovak emancipation processes proved stronger, it did help bring about the emergence of Czechoslovakia as a unified state.

After the emergence of Czechoslovakia Anton Štefánek backed and asserted the introduction of sociology as a taught discipline at the Faculty of Philosophy of Comenius University in Bratislava. As at that time the national intelligentsia was not very large and there was no degree-holding sociologist in the country, up until 1938 the seminar in so-

ciology was taught by figures from the Czech branch of sociology. It was mainly thanks to Štefánek's personal intervention that first professor Josef Král came to Bratislava (he taught there in the years 1924–1932 and focused on social development and progress and introducing the works of the classic authors in sociology, Durkheim and Spencer). Král was later replaced at Comenius University by the empirically oriented Otakar Machotka.

Further promising co-operation between Czech and Slovak sociologists, which started up again after 1945, was forcibly interrupted in the Czech lands and Slovakia by the onset of the communist regime after 1948. A joint protest staged by figures in Czechoslovak sociology – I. A. Bláha, E. Chalupný and A. Štefánek – was of no help. Sociology was declared a 'bourgeois pseudo-science' and in both lands was completely abolished, or at best replaced by historical materialism.

The revival of sociology in the mid-1960s took place amidst close co-operation between Czech and Slovak sociologists. The most important sociological event to occur at that time – Machonin's research on social stratification, the results of which were published under the title 'Československá společnost' (Czechoslovak society) in 1969 in Bratislava – involved the participation of a joint Czech and Slovak research team. This research however was struck by the same fate in both lands; after 'normalisation' at the start of the 1970s the work was branded by the powers at that time as an expression of right-wing opportunism in Czechoslovak sociology, and both authors of the work were politically persecuted.

In the period of the 1970s and 1980s Czech and Slovak sociology evolved quite similarly – the main feature of both was the ideological constraints they were under. The consequences of normalisation had an impact on the level of sociological thought which in both lands had been developing so promisingly. Certain differences expressed themselves only in terms of the degree to which prohibited sociologists were existentially persecuted – in Slovakia normalisation for various reasons took a somewhat milder course than in the Czech lands, where almost an entire generation of sociologists were banned from publishing and an almost exclusively rigid and orthodox Marxism took over. But in both the Czech lands and Slovakia sociology became isolated from developments in the world.

Following the democratisation of conditions after 1989, sociology in Czechoslovakia began to develop freely and renewed contacts with world sociology. After the emergence of independent Czech and Slovak states in 1993, however, the mutual contacts between Czech and Slovak sociology began to diminish. In the second half of the 1990s only a few joint bilateral projects were being conducted, scientific co-operation in both republics was oriented more towards the countries of Western Europe and at the research programmes of the European Union. Communication and co-operation between national sociologists in Central Europe has now received a boost from the German project GESIS, which provides information on the web (www.gesis.org) about research studies, and has issued a publication entitled 'Three Social Science Disciplines in Central and Eastern Europe. Handbook on Economic, Political Science and Sociology (1989–2001)'.

An attempt at breaking down the growing bilateral isolation came with the first Slovak-Czech Sociology Days, which were held 15–16 April 1999 in Bratislava. The organisers of this meeting were the Slovak Sociological Society at SAV and the Masaryk Society of Czech Sociology, and considerable help was also provided by the Friedrich Ebert Stiftung foundation in Bratislava. The event was aimed primarily at the issues of changes stemming from the transformation in the Czech lands and Slovakia. More than fifty Czech and Slovak sociologists took part in this conference and presented information on their research and on opportunities for further co-operation. At the conclusion of the

conference the Czech sociologists promised by way of reciprocation to organise a similar conference in the Czech Republic, which took place in Prague just recently.

Robert Klobucký

A Workshop on the Non-profit Sector at CERGE-EI

On 27 February 2004, a workshop on the non-profit sector in the Czech Republic was organised by researchers from CERGE-EI (Brhlíková, Ortmann, Svitková), a joint worksite of Charles University and the Academy of Sciences of the Czech Republic, and from the Faculty of the Humanities at Charles University (Skovajsa). This was the first workshop of its kind in the country and was attended by almost 30 participants from the Czech Republic, the Slovak Republic, and even the USA. The participants included the most prominent researchers on the non-profit sector (e.g. Frič, Goulli, Pospíšil), along with representatives from the statistical offices of the Czech and Slovak Republics (Vošvrdová, Bernardová, Stěpánková), the Comparative Non-profit Sector Project in Central Europe at The Johns Hopkins University (Green), and representatives from various other organisations (e.g. Krnáčová from Transparency International).

The workshop was dedicated to several major themes, indicated in the titles of the two sessions of the workshop: *Governance, Transparency, and Accountability* was the title of the first session, and *Quality of and Access to Relevant Data* was the title of the second. Both sessions were chaired by Marek Skovajsa.

The speakers in the first session were Ortmann, Svitková, Krnáčová, Green, and Brhlíková. The general theme of the session was that if the non-profit sector wants to increase its reputation among the public it needs to become transparent and accountable. Using a simple game theory model, Ortmann explained why trust in non-profits (by the public, the state, donors, clients) requires transparency and accountability. Svitková discussed the relatively positive Dutch experience with an accreditation system and introduced the audience to the detailed information that the US 990 form provides to people interested in learning more about non-profits (whether they are researchers or potential donors). Krnáčová gave examples of what she would consider a transparent organisation (e.g. board members' CVs are publicly accessible, information is available on fundraising expenses relative to revenues and programmes funded or run.) She argued that if required to comply with these simple standards all the non-profits whose websites she had browsed the night before would fail the transparency test. Green talked about right-to-information legislation, pointing out that such laws often become neutralised and perverted by secrecy laws, which declare issues of national security and other legitimate and not so legitimate items to be off-limits. He reported that in his various studies, he found no clear-cut effect between the index of the right to information and measures such as Transparency International's Corruption Perception Index. Brhlíková talked about the US-focused cyber-accountability discussion list – an international community of more than 350 academics, advocates, consultants, enforcement officers, journalists, etc. that discusses issues online, such as the definition of charity fraud, acceptable fundraising ratios, principles of accountable and transparent institutions, or concrete examples of abuses.

The plenary discussion following these presentations touched on a number of issues. It was noted that accountability and transparency starts with people, but that the perceived underfunding of the sector meant that non-profits do not have the professionals that are up to the task. The response to this was that it does not take professionally trained accountants to say how much money, as an in-

stitution, you get and how you spend it. It was suggested that the kind of accountability that one could expect ought to be a function of the kind of organisation under scrutiny (small, large, few donations, many donations, etc.) It was pointed out that elsewhere, e.g., in Maryland in the United States, there exist relatively simple and straightforward sets of principles of accounting, which could be used as a template in the Czech Republic and Slovakia. The issue of a system of accreditation similar to the one in the Netherlands was also briefly discussed. It was acknowledged that a system of this kind faced important problems, such as who should and who would initiate it. Such an initiative either would have to establish its reputation and credibility on its own or use the reputation of an existing watchdog organisation, such as Transparency International. It was noted that such a watchdog agency would have to be an exemplary organisation in terms of its accountability and transparency. There was agreement that the last thing needed are more laws and rules, of which there already seem to be plenty (especially so for foundations, foundation funds, and public benefit organisations; less so for voluntary associations). Unfortunately, these laws and rules appear to be poorly enforced: two-thirds of the registered foundations, foundation funds, and public benefit organisations do not submit the mandatory annual reports to the Ministry of Finance, and they seem to get away with it. The proposal made by CERGE-EI representatives that a discussion list be launched, similar in purpose to the cyber-accountability list (www.cyb.acc.org), was met with little interest.

The speakers in the second session were Štěpánková, Bernardová, Pospíšil, Kostolanská, Stulík, and Vajdová. Štěpánková provided an overview of the data that the Slovak Statistical Office compiles. She also summarised some of the trends that are apparent in the data. Bernardová, from the Czech Statistical Office, offered an overview of the data that the Czech Statistical Office (CSO) compiles. She also summarised some trends, and mentioned that the CSO, in conjunction with the Centre for Research on the Non-profit Sector in Brno is working on satellite accounts, which better capture the scope of the Czech non-profit sector. Pospíšil pointed out that there are various agencies and organisations that collect a great deal of data. He also acknowledged that these data collection efforts are poorly if at all co-ordinated, that the collected data are often raw data, user-unfriendly and not accessible to 'mere mortals'. Kostolanská reported on a study by her organisation (SPACE), which focused on social services and to some extent checked officially provided statistics. While that study drew on an extensive survey (35 questions, of which the majority were open), the selection criteria of the sample and the return rate raise methodological questions about the value it can add to our understanding of the third sector. Stulík pointed out that the poor state of NGO-related studies is likely to have dire consequences for the ability of the two countries to secure EU programme help, an interesting variation on the theme of the first session. Vajdová highlighted the diversity of topics covered in the existing secondary data sources, but she also criticised the lack of systematic research on NGOs in general.

The plenary discussion following this session addressed the following questions: What data are we missing? How can non-profits and statistical offices collaborate on better data collection? There was a sense that, while there are a number of data collection efforts, they are wanting in terms of quality (control) and user-friendliness. Even simple data such as fundraising ratios (repeatedly mentioned in the first session as an important measure of an organisation's accountability, transparency, and effectiveness) are currently not available, or only very indirectly (through analysis, for example, of the various programmes that are funded by the major foundations). No consensus was reached with regard to the quality or accessibility of data. The representatives of the sta-

tistical offices acknowledged that they could not vouch for the quality of the data and that they essentially trust the provider organisations to submit accurate data. The good news is that the representatives of these offices seem willing to share data to a large extent.

It was suggested that the impressive collection of data sources compiled by Pospíšil and his colleagues be elaborated by two more columns, which would try to address the questions of a) the quality of data and b) the accessibility of data. Right now, answers to these questions are tentatively available only for foundations.

It was noted during the discussion that whatever data are currently available are almost exclusively hard data. The kind of soft data that would allow the interested public to assess the internal workings of non-profits, and thus facilitate the accountability and transparency of non-profits, does not seem to exist, although it was suggested that time trends of volunteer hours and donations could be used as an indicator of the degree of trustworthiness that the third sector, and even certain organisations, enjoy. There was no agreement though on this issue.

It became clear during the discussion that there are two very different notions about what constitutes desirable data. One is informed by the wish to understand the third sector from the perspective of a social policy maker; e.g. looking at what the scope of the sector is, how it has grown, and where it has grown. The other is informed by the wish to address accountability and transparency issues. It is not clear whether these two goals are incompatible per se, but they contributed to a sense of puzzlement on both sides of the debate.

The workshop ended with a discussion among those interested about the possibility of a doctoral study programme that would integrate the doctoral study programmes of various disciplines (economics, sociology, philosophy, law). Such programmes have been proposed by the Grant Agency of the Czech Republic, and they seem to represent a laudable attempt to foster interdisciplinary work on topics, such as the third sector, social capital, trust and growth. It was decided that the idea was interesting enough to be pursued further.

Overall, the workshop fulfilled its purpose of gathering together a diverse group of people concerned with non-profit issues. While there was no tangible outcome, the workshop served its intended function. It encouraged a debate that, if continued, is likely to contribute to a better understanding of the issues reflected in the titles of the two sessions: the transparency and accountability of NGOs, and the availability of NGOs-related data. Additional information about the workshop is accessible at home.cerge-ei.cz/brhlkokova/npos.

Andreas Ortmann

The European Science Foundation – A Platform for the Integration of East European Social Scientists into the European Research Space

The European Science Foundation (ESF) is a European association of national organisations (research councils, academies and other national scientific institutions) responsible in their respective countries for the support of scientific research. Established in 1974, as of 2003 the Foundation comprised 76 member organisations from 29 countries. It is a non-governmental organisation, although its member organisations are usually publicly funded agencies.

The scientific work sponsored by the ESF includes research in the medical sciences, the life and environmental sciences, the physical and engineering sciences, the humanities and the social sciences. In these domains, there are five 'Standing Committees' for the individual disciplines, made up of scientists nominated by the member organisations, which are responsible for identifying scientific priorities, formulating strategies and developing research agendas. There

are also a number of Expert Committees that provide additional advice in areas requiring special attention.

The Standing Committee for the Social Sciences covers a wide domain of disciplines, including:

- psychology, cognitive sciences
- pedagogy, education research
- social anthropology
- sociology
- women's studies
- economics
- business and administrative sciences
- geography
- demography
- environmental sciences
- law
- political sciences
- communication sciences
- international relations
- social statistics and informatics.

ESF employs a number of instruments in its activities. The principal one is the *ESF Collaborative Research Programmes* (EUROCORES), which are aimed at co-ordinating European research funding on priority topics through a joint call for proposals and a single peer review system. *ESF Scientific Forward Looks* enable Europe's scientific community to develop medium to long-term perspectives and analyses of future developments in multidisciplinary topics viewed at a European level. Another action line is that of *Research Infrastructures*, aimed at providing scientific advice and assessments on topics covering medium-scale and large infrastructure facilities. The Foundation also employs four principal networking instruments. *ESF Exploratory Workshops* enable scientists to come together and to examine topical scientific issues. *ESF Scientific Networks*, interdisciplinary in character, are orientated towards co-ordinating activities in order to stimulate and consolidate the European scientific community in specific fields. *ESF Scientific Programmes* are long-term activities focused on specific themes. They bring together research projects carried out by multinational teams of researchers. While Exploratory Workshops and Networks are funded from the ESF general budget, programmes are funded on an 'à la carte' basis by participating member organisations. *The European Research Conferences* (EURESCO) Programme consists of a series of top-level scientific meetings whose aim is to stimulate discussion towards exploring research frontiers.

ESF pays for its activities through the contributions of its membership organisations. These are made both to the ESF general budget, to which member organisations contribute at a rate calculated on the basis of their country's GDP, and to the specific scientific programmes and projects in which member organisations decide to participate. The European Commission contributes partial funding of European Research Conferences.

Until the early 1990s, ESF had (with the exception of Turkey) only Western European members. After the demise of the communist regimes, organisations from the former Soviet bloc countries started to join. Nine of them – Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Poland, Romania, Slovak Republic, Slovenia – are currently represented in the ESF.

The Czech Republic is represented by the Academy of Sciences of the Czech Republic and by the Grant Agency of the Czech Republic. The two Czech member organisations co-ordinate their activities in the ESF and they also contribute equal financial resources for ESF membership fees and other expenditures stemming from participation. A joint committee for co-operation with the ESF decides on strategic issues of co-operation and co-ordinates activities of both member organisations. While the Academy of Sciences is primarily responsible for mediating contact with ESF activities for academic research institutes, the Grant Agency of the Czech Republic provides the same service for universities and other institutions of higher learning. Co-operation was estab-

lished with all five ESF Standing Committees, including the *Standing Committee for the Social Sciences* (SCSS) and the *Standing Committee for the Humanities* (SCH). Czech scholars are now represented in all these bodies and they have become involved in most of the above-mentioned ESF activities. Access to the two most prestigious instruments – the Collaborative Research Programmes and the Scientific Programmes, where additional financial contribution is required from member organisations intending to participate, is limited by the availability of the required resources.

As regards the social sciences, Czech scholars have so far taken part in four ESF Scientific Programmes.

1. *Social Variations in Health Expectancy in Europe* (HEIES) (1999–2003), the aim of which was to achieve an understanding of the complexities of causes behind inequalities in health in order to determine where the chain of causation could potentially be broken. The programme was successfully concluded in 2003.

2. *Changing Media – Changing Europe* (MEDIA) (2000–2004). This interdisciplinary Programme, involving both social scientists and humanities researchers, is focusing on networking researchers around four main themes: citizenship and consumerism (media, the public sphere and the market), culture-commerce (media between cultural policy and industrial policy), convergence-fragmentation (media, technology and the information society), homogenisation-diversity (media and cultural identities).

3. *Quantitative Methods in the Social Sciences* (QMSS) (2003–2007) aims to advance knowledge in the methods of analysing increasingly complex social scientific data – such as the large pan-European data sets – and thus to advance comparative quantitative social science. This is achieved through a series of workshops and seminars, which train junior social scientists in the latest methods of analysis of longitudinal data, cross-national cross-sectional data, network data, intervention data, and issues of measurement, data collection and data quality.

4. *European Social Cognition Network* (ESCON) (2003–2008). Its objective is to enhance European scientific collaboration in the field of social cognition by calling on the expertise and knowledge of European researchers on the frontiers of research, and by helping to lay the foundation for an advanced European research training programme in social cognition for young scholars.

An important component of Czech cooperation with the ESF is the participation of Czech sociologists in the *European Social Survey* (ESS) Programme. This large infrastructural project, initiated by the ESF Standing Committee for the Social Sciences and set up under its auspices, is aimed at conducting, every second year, a representative nationwide survey in European countries, focusing on themes of European relevance and organised in a rigorously comparative manner. Twenty-three European coutries participated in the first round of the survey in 2002, including Hungary, Poland, Slovenia and, of course, the Czech Republic. In the Czech Republic, the survey was organised by the Institute of Sociology of the Academy of Sciences and the data, together with datasets from other participating countries, have already been made freely available on-line for academic use at http://ess.nsd.uib.no. In addition to a number of core items (demographic characteristics, education, occupation, financial and household circumstances, attitudinal data on political interest and participation, socio-political orientations, and on moral, political and social values, well-being, social inclusion/exclusion, public trust in government, issues of governance and efficacy of institutions, national, ethnic and religious allegiance), it also includes data on rotating items - immigration, asylum-seekers, political knowledge. The second round of the ESS, scheduled for 2004, is soon to begin. Up to twenty-eight countries are expected to take part. In this case, the rotating items include

questions on family, health, economic values and morality. As in several other countries that joined the ESS, in the Czech Republic also it is a major problem to find a way in which to secure stable and continual financing of this highly important, yet costly project.

Other instances of Czech participation in ESF activities could equally be mentioned. Both for the Czechs, and for their colleagues from other ex-communist European countries, the European Science Foundation has proved to be an effective and intellectually challenging platform for their integration into the wider European research space.

Michal Illner

English Editions of Sociologické texty/ /Sociological Papers 2003

SP 03:3 Work and Job Values in CEE and EU Countries

Jiří Večerník

The study presents a critical reading of opinion data on work and job values using data from three cross-national surveys: the ISSP module on Work Orientations, the European Values Study and the Households-Work-Flexibility survey. The first part describes some methodological problems and then illustrates them through previous research. The second part briefly presents the sources of data on work values. The third part presents the results and conclusions of the analysis, revealing differences between Central-Eastern Europe (CEE) and EU countries with regard to people's satisfaction with their jobs, the degree of control they feel they have over different aspects of work and other indicators, raising the question of the "true" value change that occurred during transition.

SP 03:8 Pre-election Polls, Election Results, and Validity of Measurement before the 2002 Elections

Martin Kreidl, Tomáš Lebeda

The text offers an empirical assessment of the quality of the measurements of voting preferences taken before the parliamentary elections in the Czech Republic in the year 2002. It looks at the results and measurement techniques employed by various public opinion poll agencies and evaluates their validity. Two rudimentary, rather different approaches are employed – one focusing on the construct validity of measurement, the other focusing on its criterion validity. The first part looks at the use of advanced statistical instruments intended for measuring the construct validity of scales in order to look at the differences in achieved validity between agencies. The second part of the text describes and assesses the criterion validity of instruments employed, focusing on election predictions and comparing them with actual election results.

SP 03:9 Women's Civic and Political Participation in the Czech Republic and the Role of European Union Gender Equality and Accession Policies

Hana Hašková, Alena Křížková (eds.)

Authors: Hana Hašková, Alena Křížková, Marta Kolářová, Marcela Linková, Dagmar Lorenz-Meyer, Petra Rakušanová, Lenka Václavíková-Helšusová

The text delivers a report on the political and civic participation of women and the representation of their interests in Czech society as part of the processes of democratisation and the entry of the Czech Republic into the European Union. In the first part the authors look at the degree to which women and women's interests are represented within the framework of the governmental institutions and civic organisations and activities involved in the process of political decision-making in democratic societies. In the second part the insufficient degree of political and civic participation by women in Czech society is examined from the perspective of gender equality and EU enlargement, as two of the most important issues in EU policy.

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