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Parenting Desires and Sexual Identities*

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Abstract: The paper asks how parenting desires are associated with the construction of sexual identity and what factors most influence whether gays/lesbians, bisexuals, and heterosexuals declaring same-sex attraction want to have (more) children. The subject has been explored mainly in the Western liberal and gay-family-friendly legislation and social environment so far. Our study was conducted in the Czech Republic, a CEE country where sexual minorities face strong legal and social barriers to non-heterosexual parenthood. In an online survey (N = 882) conducted in 2019 among self-identified gay, lesbian, bisexual, and heterosexual people with same-sex attraction, we found a considerable gap in parenting desires by sexual identity. Parenting desires are weaker among homosexuals, especially men, while bisexuals are closer to heterosexuals in their parenting desires. Our research suggests that in the context of discussions of parenthood Czech women are unwilling to identify as lesbians and opt instead to claim a different sexual identity. Our findings indicate that the structural barriers to parenthood thus play a much more important role than the overall liberal-minded atmosphere in the Czech Republic.

Keywords: parenting desires, sexual identities, LGB individuals, Czech Republic/Czechia, CEE country, survey methodology

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Introduction

With¹ a changing social climate and advancing reproductive technologies, Western societies are opening parenthood up to non-heterosexuals. Homosexuality no longer necessarily means that a man or woman must remain childless [Patterson 2001]. Nevertheless, in 2011, there were only about 1000 children living in the families of Czech same-sex couples according to the Czech census [Sloboda 2020]. Although the actual number of children growing up in Czech same-sex households is undoubtedly much higher, it could hardly be said that there has been a baby-boom among Czech gay or lesbian couples [cf. Johnson and O'Connor 2002; Patterson 2001].

The opportunities that people with non-normative sexualities have to start a family differ by how friendly different cultures are to their reproductive rights or to the rights of single individuals. Although many countries have granted rights to non-heterosexuals that are equal to those of heterosexuals, in some countries these opportunities are strongly constrained by laws and public opinion [Costa and Bidell 2017]. Although in many countries society is much more tolerant of homosexuality than before [McCormack 2018], the domain of family, parenthood, and childcare has resisted these liberalising tendencies, and there is persistent 'institutional heterosexism' (laws and other settings explicitly prohibiting adoption or ART for same-sex couples). Furthermore, a backlash against sexual minority rights has emerged in the EU in recent decades, and not just in Central and Eastern Europe (CEE) [Kuhar and Patternote 2017].

The efforts to promote the reproductive rights of non-heterosexual individuals have brought questions about their parenting preferences to the fore. Gato et al. [2017] provide an insightful review on this subject and have identified its blind spots. One of the issues they highlight is the lack of research on the impact of factors specific to individual cultures on the parenting desires and intentions of people with non-heterosexual sexual orientation (e.g. the role of internalised homophobia and social stigma, 'institutional heterosexism' and gatekeeping, generational changes within various cultural contexts). The authors also note the need to examine contexts outside the Anglosphere, which has been the predominant focus in the literature so far, and to look at the parenting desires and intentions of bisexuals as well [Gato et al. 2017].

We aim to address at least some of these blind spots in our paper. We ask how people with non-heterosexual orientation (lesbian women, gay² men, bi-

¹ The paper was supported by the Czech Science Foundation within the project 'Parental Desires and Intentions of Gays, Lesbians and Bisexual Men and Women in the Czech Republic' (Reg. Project No.: 18-07456S); and with the institutional support of RVO 68378025.

² (A) gay is a commonly used synonym for (a) homosexual. Because homosexuality was long treated as a disease or at least as undesirable, some of this old negativity still clings to the word homosexual, especially as a noun. 'Gay' is a newer concept and is free from

sexuals, and heterosexuals declaring same-sex attraction) perceive parenthood, whether parenthood is among their life priorities, and whether they want to become parents at all (i.e. what are their parenting desires). Second, we explore how various types of factors interact with their sexual identities and how they influence their parenting desires.

Our study explores the role of various factors on the parenting desires and attitudes of the above-mentioned non-normative sexualities in the cultural context of the Czech Republic, a CEE country that exhibits a peculiar mix of opposing tendencies. On the one hand, Czech society is highly secular, the influence of the Catholic Church is very limited, attitudes to gay men and lesbian women are tolerant, and there is a long tradition of civil unions available to these men and women [Burešová 2020]. On the other hand, strong ‘institutional heterosexism’ persists. Same-sex couples are explicitly prohibited from adopting and from access to ART and single women are not allowed access to ART either. Studying this particular context should therefore shed light on the various roles played by strong legal barriers and relatively liberal attitudes to non-heteronormative sexualities in societies.

Our study is based on a unique online questionnaire survey of a sample of 882 respondents including self-identified bisexuals, gay men, lesbian women, and heterosexuals who declared a same-sex sexual or romantic attraction. The research design of the study and the method used in the analysis allowed us to compare the differences between these groups.

We argue that in a cultural context with a high level of ‘institutional heterosexism’ but liberal attitudes towards gay men and lesbians, sexual identity is strongly and gender-specifically associated with people’s notions about parenthood and reflects the actual structural barriers to parenthood in society rather than liberal attitudes towards non-heterosexuals. Furthermore, our research suggests that women, in particular, seem to have very flexible sexual identities when reflecting on parenting issues.

Sexual orientation, identity, and parenthood

Parenting desires are considered a precursor to parenting intentions, as stated wishes or beliefs about what one wants or would like to do [e.g. Baiocco and Laghi 2013; Riskind and Patterson 2010]. Quantitative studies on LGB³ individu-

this negative connotation. The term gay is mainly used for men, i.e. gay men or just gays. However, the term ‘gay women’ is not uncommon either. In this text, we use the term gay men (or gays) and lesbian women (or lesbians) for men and women identifying as homosexuals. In some established phrases, such as ‘gay-family friendly legislation’ or ‘anti-gay-family legislation’ we use the term ‘gay’ to mean ‘homosexual’.

³ LGB is an acronym for lesbian (L), gay (G), and bisexual (B) individuals.

als' parenting desires [for an overview see Gato, Santos and Fontaine 2017] are highly heterogeneous in terms of how they define their research problem and their representativeness, sample composition, sampling methods, and social and cultural context, etc. Their findings are difficult to compare because of methodological and often also cultural differences. Nevertheless, subject to some simplification, the existing evidence suggests the following:

- (i) Gay men and lesbian women exhibit weaker parenting desires and intentions than heterosexuals [e.g. Riskind and Patterson 2010; Baiocco and Laghi 2013].
- (ii) Lesbians declare stronger parenting desires than gay men [ibid.]. This is because parenthood continues to be strongly associated with femininity, while men's homosexuality tends to imply childlessness.
- (iii) Few studies have focused on bisexuals [Costa and Bidell 2017; Riskind and Tornello 2017; Herek et al. 2010]. Some US studies indicate that in terms of their parenting desires and intentions bisexuals resemble heterosexuals more than they do lesbians and gay men [Riskind and Tornello 2017].

Research has revealed several factors that significantly influence parenting desires in the context of sexual identity and gender. Some of these studies have distinguished the categories of sociodemographic, personal, relational, and contextual factors [Gato, Santos and Fontaine 2017] and cultural factors [Leal, Gato and Tasker 2018].

- (a) *Sociodemographic factors* primarily include sex/gender, age, race/ethnicity, and sometimes nationality [Costa and Bidell 2017], as well as education level, socio-economic status, perceived health, religiosity, etc.
- (b) *Personal factors* comprise mainly the internalisation of anti-homosexual prejudice and openness about one's non-heterosexual orientation as well as one's motivations to become a parent [e.g. Gato, Leal and Tasker 2019].
- (c) *Relational factors* typically include partnership status or the partner's parenting motivations [Gato, Santos and Fontaine 2017], and sometimes also that the partners agree on parenthood plans. The perception of being supported by one's close social environment, especially family of origin, partner, and close friends, is also considered an important factor [Baiocco and Langhi 2013].
- (d) *Contextual factors* relate mainly to the perceived living standard; access to LGB support networks, information, and social, legal, and medical barriers.
- (e) *Cultural factors* include familism and the value of motherhood as representing a key aspect of female identity [Leal, Gato and Tasker 2018] and the association of childlessness with gay masculinity [Connell and Messerschmidt 2005].

It has been found that the effect of many factors on parenting desires and intentions, like age, may be significantly shaped by the cultural, legislative, and methodological differences that exist between studies [e.g. Gato, Santos and Fontaine 2017]. This underlines the need to contextualise findings in the cultural context of a given society.

Cultural context: the attitudes of Czech society to same-sex couples and their rights and the legal framework

Heteronormativity in the Czech Republic is inscribed in the institutional framework of family life. It manifests itself in the continued inequality of the rights and status of same-sex couples [Burešová 2020]. Although the Czech Republic was one of the first post-socialist countries to legislate civil unions (in 2006), same-sex marriage has not been legalised, despite multiple civic initiatives. Existing laws do not allow (non-biological) second-parent adoption in same-sex couples, let alone joint adoption; surrogacy is not adequately regulated by the Czech law [see Burešová 2020; Sivák 2021], and IVF is not available to single women either,⁴ let alone lesbian couples⁵ [Hašková and Sloboda 2018]. The legal framework in a society, however, can importantly influence the parenting desires of non-heterosexuals [Baiocco, Argalia and Laghi 2014].

Czech public opinion has been continuously supportive of some rights for same-sex couples to a legally or formally recognised partnership and parenthood, with high long-term acceptance of civil unions (around 75%), while approximately 50% of the population endorse same-sex marriage. Although in 2005 only 19% of the population supported the right of gay men and lesbians to adopt children, by 2017 the figure had grown to 51% of the population supporting the adoption of non-biological children and 68% of the population endorsing the adoption of a partner's child. These rights are more often supported by women and younger people (up to the age of 44), by people who are satisfied with their living standard and with their life, and by those who declare a centrist or liberal-right political orientation or report having gay/lesbian friends [CVVM 2019]. According to the Eurobarometer on Discrimination [2019], the Czech Republic scores below the EU average on support for the rights of gays and lesbians: 57% of the Czech

⁴ ART including IVF are available to women under the age of 49.

⁵ Same-sex couples are not the only group that is denied access to ART and adoption in the Czech Republic and in this context the term 'bionormativity' can be used. Given that we are concerned with the issue of access to parenting (which has biological and social dimensions) for people with gay identities in comparison to some other sexual identities, the use of the term heteronormativity is legitimate. One of the features of heteronormativity is essentialism, which constructs heteronormativity and the resulting marginalisation of non-heterosexuality as 'natural' [cf. Kimmel 2003] and thus leads to the exclusion of people with gay identities from reproduction.

population endorsed equal rights for gays/lesbians and for heterosexuals (compared to the EU-28 average of 76%), while 48% agreed with same-sex marriage (the EU-28 average was 67%).

Despite its low religiosity, Czech society exhibits remarkably conservative attitudes to private and family life. The prevailing notion of the ideal family continues to be that of a heterosexual nuclear family, preferably with two biological children, although partnerships and family arrangements, in reality, are much more diverse and often at odds with this ideal [Hašková et al. 2014; Sloboda 2020].

The parenting desires and intentions of people with non-heterosexual identity is an under-researched topic in the Czech Republic. To now there has been only one study, which was conducted online on a non-representative sample of 408 lesbian, gay, and bisexual individuals, where 71% of childless people expressed the desire to have a child [Hájková 2014].

Methodology

Participants

The dataset (further referred as LGB Parenting 2019) originates from a research project that examined non-heterosexuals' notions of parenthood that primarily included people who self-identified as lesbian, gay, or bisexual. The sample for this research also included self-identified heterosexuals who exhibited same-sex romantic or sexual attraction. In addition to parenting desires and intentions, we also studied the obstacles to parenthood perceived by different groups of lesbian, gay, and bisexual individuals and which pathways to parenthood they preferred. The inclusion of individuals with heterosexual identity declaring same-sex attraction allowed us to compare non-heterosexuals with people who see themselves as heterosexuals, even if their sexual preferences might be much more complex.

To sum up, our sample, collected in 2019, comprised 882 respondents in total, of whom 127 identified as gay men, 29 as lesbian women, 96 as bisexual men, and 177 as bisexual women. In addition, there were 95 men and 319 women who identified as heterosexual and reported same-sex attraction (i.e. agreed with the statement that they had felt romantic or sexual attraction to one or more same-sex persons in the past five years); 16 men and 23 women in the sample were unable or unwilling to state their sexual identity while reporting same-sex attraction. The sample only included the 25–49 age group because this is the age at which the issue of parenthood is the most relevant.

Measurement of sexual orientation

Measuring the preferences of people with non-normative sexualities raised the question of how to operationalise and measure sexual orientation. The way sexu-

al preferences are defined strongly shapes how many people are included in the category of 'non-normative sexualities and what their characteristics are.

There is some level of consensus on the three main elements of sexual orientation that can be used for measurement: sexual identity (how one identifies, typically measured on some form of gay-straight scale), sexual behaviour/experience (whom one has sex with, typically indicated by the gender of sexual partners), and sexual attraction (whom one feels sexually attracted to, again in terms of same-sex or opposite-sex individuals) [Wolff et al. 2017; Mishel 2019; Truman et al. 2019].

Large-n representative studies, mostly in the fields of criminology or health, indicate that the above three elements often do not necessarily overlap at the individual level [Geary et al. 2018]. For example, people exhibiting same-sex behaviour and same-sex attraction do not necessarily identify as gays, lesbians, or bisexuals [e.g. Carrillo and Hoffman 2018; Diamond 2005]. Higher levels of congruence between attraction, behaviour, and identity are found among women than men – a fact likely associated with the predominant norm of hegemonic masculinity, which, unlike femininity, requires strict heterosexuality [Connell and Messerschmidt].

The number of people who identify as gay, lesbian, or bisexual people thus tends to reflect the different ways in which sexual orientation is defined. The lowest numbers of them are found when sexual orientation is defined in terms of identity: studies measuring how many people identify as bisexual, gay, or lesbian have typically put the share at around 2–3% of the population; other studies have found much larger numbers of people indicate same-sex attraction or to have engaged in same-sex behaviour [Geary et al. 2018; Mishel 2019; Truman et al. 2019; Wolff et al. 2017; Richters et al. 2014]. Since non-heteronormative sexualities are disadvantaged in multiple ways, including labour market and access to housing, and are disproportionately often exposed to negative stigmatisation by society [for a review see Mishel 2019], it is no surprise that they avoid identifying as lesbian, gay or bisexual.

The operationalisation of sexual orientation in a study has to be consistent with the research goals. In our study of parenthood and parenting desires and intentions, we defined sexual orientation primarily in terms of identity, as this approach works better with topics such as discrimination or negative aspects of non-heterosexuals' lives [e.g. Scandurra et al. 2019].

Kinsey et al. [1948] operationalised sexual identities on a 7-item scale that ranged from 'exclusive heterosexuality' to 'exclusive homosexuality'. Contemporary research often uses a three-item scale of self-identification (lesbian/gay, bisexual, straight) [for an overview see Savin-Williams and Vrangalova 2013]. Some authors [Vrangalova and Savin-Williams 2012], for instance, recommend including the categories of 'mostly heterosexual' and 'mostly homosexual' to facilitate self-classification for those without a clearly defined sexual identity.

In our study, sexual identity was measured by the single-response item 'How would you personally identify?' with the options of heterosexual, bisexual,

gay/lesbian, other, don't know, and can't say. People other than bisexual or gay/lesbian were asked whether they had felt in the past five years any romantic or sexual attraction to a person of the same sex.

Sampling procedure

It is difficult to collect a representative sample of lesbian, gay, and bisexual individuals and pertinent studies to date have mostly relied on convenience (or community-based) samples [Baiooco and Laghi 2013; Costa and Bidell 2017]. Although Krueger et al. [2020] argue that well-done community-based sampling is a suitable tool for LGBTQ+⁶ population sampling, they pointed out that the sample yielded using this sampling method differs from the sample produced using a probability-based method. In their study, the LGBTQ+ sample created using community-based sampling included fewer bisexuals, more people with higher education and higher socioeconomic status, and more people living in urban areas than would have been in the sample they would have had using probability-based sampling [Krueger et al. 2020]. In general, the quality of the LGBTQ+ community-based samples depends on where the data are collected (the variability of the chosen venues). The situation is particularly complicated when there is neither the necessary sampling frame for the entire group nor detailed knowledge of its parameters, like in our case.⁷

Our sample was recruited via a large online panel (the Czech National Panel; CNP) including more than 55 000 respondents. Online surveys are a good way of reaching our age group (25–49), in which more than 95% of people claim to use the Internet every day [CZSO 2019].

The panel includes the Czech internet population aged 15–65 and its management and recruitment are guided by a rigid methodology. The identity of panel respondents is verified in several ways (by telephone, the respondent's address, and bank account). Unreliable respondents are excluded from the panel (CNP uses lie scores, an analysis of the time spent filling out a questionnaire, and special questions to check whether the respondent is paying attention). Moreover, respondents are motivated by being able to choose both financial and quasi-financial incentives (they can donate the 'money' they earn to charity) to participate in surveys to prevent the 'professionalisation' of respondents in the CNP. According to the StemMark (SM) representative, the use of quasi-financial incentives among CNP participants is very popular.

⁶ LGBTQ+ is the acronym for lesbian (L), gay (G), bisexual (B), transgender (T), queer (Q) and other (+) persons than heterosexual/straight-identified ones.

⁷ There are no relevant census data, and general population surveys have produced extremely small samples of non-heterosexuals [Weiss and Zvěřina 2012].

The sampling procedure can be described as follows. First, the quotas were set for the age group 25–49. The agency uses ‘internal tables’ that are regularly revised according to Czech Statistical Office data (population data and Labor Force Survey data) to set quotas for the Czech population.⁸ The quotas were based on sex, age group, education, region, and size of the place of residence in our survey (see Table 3 in the Appendix), including cross-quotas for age group and sex and age group and education. The aim was to send the screening questionnaire on sexual identity only to the representative sample of people between the ages of 25 and 49. However, the share of people who screened out was massive. The screening questionnaire on sexual identity was thus immediately sent to all participants in the 25–49 age group registered in the panel (12 655 people in total). Only those who identified as either gay, lesbian, bisexual, or heterosexual experiencing same-sex attraction were invited to fill in the main questionnaire. The screening questionnaire was completed by 5533 respondents (44%), of which 4630 (84%) were screened out (i.e. they did not identify as either gay, lesbian, bisexual, or heterosexual experiencing same-sex attraction). Out of those who were not screened out, 796 filled in the main questionnaire completely and the remaining 107 respondents only partly completed the questionnaire. The SM agency calculated a non-response rate of 2% for the *main* questionnaire based on these 107 incomplete questionnaires out of the 903 respondents who were not screened out (see Table 1 in the Appendix for details). The response rate for the *screening* questionnaire was 44%.

The main round of fieldwork yielded 796 respondents (49% men and 51% women). The structure of respondents addressed in the first wave of data collection (i.e. everyone who was sent the screening questionnaire regardless of their sexual identity) was compared with the initial quota for the population aged 25–49. As Table 3 in the Appendix shows, the structure of respondents addressed in the first wave was roughly in line with the original quotas, except for the share of men and women in the data set (more women were addressed to fill in the screening questionnaire regardless of their sexual identity than men). Even though women were overrepresented in the first wave of data collection, self-identified lesbians were probably under-represented⁹ in the sample (N = 17). Moreover, a large share of the sample was made up of people who self-identified as heterosexuals with same-sex attraction (47%).

⁸ According to an SM representative, the agency set cross-quotas for selected variables based on their (unpublished) ‘internal tables’ (cross-quotas for age combined with sex, education, size of the place of residence, and region – were used). The ‘internal tables’ are regularly updated according to CZSO population data and LFS data (year 2019 in our case). The quotas were set for the population aged 25–49 years.

⁹ In community studies conducted in the Czech Republic 2003–2020, the lesbians comprised about 17–41% of gay-identified individuals [for details see Pitoňák 2021: 444].

Second, to increase the share of people with non-heterosexual identities in our sample (gay men/lesbians and bisexual individuals) we conducted the second round of data collection about one month after the first wave using the StemMark agency's Dialog Panel, which contains 10 549 registered respondents. The methodology used to recruit the participants for the Dialog Panel and the quality check of the survey process of this panel are similar to those of the CNP, which means that the data are compatible. We sent the short screening questionnaire on sexual identity to 3381 new respondents aged 25–49 registered in the Dialog Panel and 1547 of them responded (see Table 2 in Appendix). Those who identified as gay, lesbian, and bisexual were given the main questionnaire. The main questionnaire was completed through the Dialog Panel by 86 respondents (18 bisexual men, 25 bisexual women, 12 lesbians, and 31 gay men). The response rate for the screening questionnaire was 46%.

The final sample (containing data from both waves of data collection) included 882 individuals (38% men and 62% women). The number of lesbian-identified women, however, remained very low (only 29 in total).

The structure of the final sample was roughly in line with the quotas set for the general population aged 25–49 years at the beginning of data collection, except in the case of sex (see Table 3 in the Appendix for details). The share of women in the final sample is about 11 percentage points higher than their corresponding share in the population aged 25–49 years.

The limitations of our sample

The small number of self-identified lesbians was one of the most challenging aspects of our survey. We were initially concerned by this fact and doubted that the right sampling approach had been applied. We had been extremely careful in developing our research design and especially the sampling method, and we commissioned the fieldwork to a high-quality professional polling agency that possessed the necessary know-how.

Current literature on sexual identity offers us some explanations. Sexual identity is found to be both flexible and fluid – for example, it is prone to transform over time or according to context [Carrillo and Hoffman 2018]. While flexibility means that people 'engage in sexual behaviours with people of the sex that is not the one they are primarily attracted to', fluidity 'relates to one's sexual orientation changing over time' [McCormack 2018: 6]. Diamond [2005] demonstrated this in a longitudinal study of lesbian women, in which some women retained their sexual identity over time, others never accepted a lesbian identity, and others changed their identity depending on various situational factors. Sexual identity in bisexuals is also found to be fluid, as they are much less likely than lesbians and gays, for instance, to come out to their friends or family, especially if they live in an opposite-sex relationship or have or are expecting children [Gold-

berg et al. 2018]. Studies have also found that the sexual identity of men who have sex with men may also be flexible [Carrillo and Hoffman 2018].

However, based on the above-mentioned studies on the relationship between sexual identity and parenthood and on the flexibility and fluidity of sexual identities, we came to believe that, rather than sampling bias, we had encountered a much more deeply-rooted link between parenthood and sexual identity in the Czech cultural context.

We believe that the under-representation of lesbians in the sample is primarily attributable to the research topic. Our respondents were informed that the study dealt primarily with parenthood and parenting desires and intentions. There seems to be a tendency among women (yet surprisingly not men) to identify as straight (with 65.5% of straight-identified women in the sample) or bisexual [cf. Goldberg et al. 2018; Diamond 2005]. This may be due to the strong emphasis placed on becoming a parent among women generally and the strong association between (especially biological) parenthood and heteronormativity. While this hypothesis, of course, requires a much more detailed (and probably rather qualitative) examination, it seems to be in line with existing research evidence. Thus, even if convenience and community-based sampling would have helped us to recruit more lesbians in our sample, it would have failed to reveal this important tendency within the general population.

Furthermore, we are aware that our sample was not collected via probability sampling, which is considered to be the 'gold standard' of academic research. However, our strategy used a more affordable way of sampling an elusive population by addressing more than 12 000 people in a given age group to collect our sample. We are aware of the fact that we cannot use our data, for example, to map the representation of various groups with non-normative sexual identities in society. But it was not our aim to do so. Our analysis focuses primarily on comparing the opinions and preferences of different sexuality groups and understanding how the preferences for parenthood and the perception of barriers are shaped by non-heterosexual identity. In our opinion, this is hindered neither by the nature of the sampling using online panels nor by the fact that when recruiting our sample we addressed more women respondents (regardless of their sexual identity) than corresponds to their actual share in the population.

Results

Sexual identity and parenthood

A large share of respondents ($N = 348$; 52%) reported that they had children; this was more often the case of women (64%) than men (33%). Differences by sexual identity were statistically significant in both groups. Parenthood was most often reported by self-identified heterosexuals with same-sex attraction (58% of men

and 64% of women), for whom with some simplification we use the term 'heterosexuals' in the text below, followed by bisexuals (45% of men and 69% of women), and least often by lesbian women (N = 7; 24%) and gay men (N = 10; 8%). Among the respondents with no reported sexual identity, 3 of the 16 men (19%) and 15 of the 23 women (65%) had children. The children of gays and lesbians had in most cases been conceived in prior heterosexual relationships. Our findings are in line with existing research evidence from different cultural contexts indicating that gays and lesbians are more often childless/childfree than the heterosexual population. For instance, a Pew Research Center [2013] study on US residents aged 15–60 found 31% of lesbians and 16% of gay men to be parents; a Portuguese study revealed only about 7% of LGB individuals aged 18–78 to be parents [Costa and Bidell 2017].

Parenthood as a priority?

Czech society has consistently placed a strong emphasis on family and parenthood [Hašková et al. 2014]. Despite the widespread trend of postponing parenthood, especially since 1989, voluntary childlessness does not seem to be a generally accepted or common life strategy [Hašková 2009]. Our data also reflect the high value placed on becoming a parent: 69.5% of all, 79.6% of female, and 52.8% of male respondents declared that starting a family and raising children was a priority in their life.

There was a distinct group of lesbian women and especially gay men who supported that opinion much less than other people in the sample. Only 27.6% of gay men stated 'becoming a parent' to be a life priority, compared to 12 out of 29 gay women (41%); the latter figure is less than half of the percentage of heterosexual women who claim parenthood to be a priority (84.6%). The attitudes of people with no reported sexual identity seem to be closer to those of bisexuals, but this is merely a suggested trend given their low representation in the sample. Self-identified bisexuals were much closer to heterosexual people than to gays and lesbians. Our finding indicates that parenthood is predominantly associated with heterosexual and bisexual identities (Table 1), while gays and lesbians are much more likely to construct their identities as distant from parenthood.

Elsewhere, we demonstrate that lesbians and especially gay men attach more importance than others to social relations that are not directly associated with starting one's own family and tend instead to prioritise finding a steady romantic partner or forming close friendships. They are also much more tolerant of different non-biological forms of parenthood (adoption, foster care, step-parenting, etc.), as opposed to the dominant preference for having biological children that was observed in the other groups [Maříková and Vohlídalová 2019, 2022].

Table 1. How important is it for you to start a family and raise children? (sorted by sexual identity)

	Men*				Women*			
	Hetero- sexuals	Bisexuals	Gays	Other/NA	Hetero- sexuals	Bisexuals	Lesbians	Other/NA
It is important	74.7%	64.6%	27.6%	56.3% (N = 9)	84.6%	76.8%	41.4%	60.8% (N = 14)
Neither /nor	11.6%	14.6%	26.0%	25.0% (N = 4)	6.9%	10.2%	37.9%	8.7% (N = 2)
It is not important	9.5%	16.7%	40.9%	18.8% (N = 3)	6.9%	10.7%	13.8%	17.4% (N = 4)
Don't know	4.2%	4.2%	5.5%	0.00%	1.6%	2.3%	6.9%	13.0% (N = 3)
Total	100.0%	100.0%	100.0%	100.00%	100.0%	100.0%	100.0%	100%
N	95	96	127	16	319	177	29	22

Source: LGB Parenting 2019.

Note: * statistically significant differences between sexual identity groups, tested by χ^2 test ($\alpha = 0.01$).

Factors affecting parenting desires

Respondents were asked whether they wanted to have a (or another) child. The basic descriptive analysis revealed similar trends as indicated above.

Among men, but not women, the desire to have a (or another) child was significantly associated with sexual identity. Self-identified heterosexual men were the most likely to want children (58%), followed by bisexual-identified men (52%) and men with no reported sexual identity (50%; $N = 8$). In contrast, gay-identified men were much less likely than others to want (more) children – only less than 28% expressed this desire (see Table 2). The share of respondents who did not want (more) children or were unable to answer the question was also much higher among gay-identified men.

The differences among women were not statistically significant. The proportion of women who stated that they wanted to have (more) children ranged between 54% among self-identified heterosexual women and 48% among self-identified lesbians. Nevertheless, the share of respondents unable to answer this question was considerably larger among lesbians and women with no reported sexual identity. While again this is rather a suggested trend given the small numbers of these categories in the sample, these women seemed to view their parenthood choices as complicated and ambiguous.

The finding that parenting desires are strongly shaped by sexual identities was also confirmed in the subsample of childless respondents. Here, 70% of men and 76% of women who identified as heterosexuals wanted children, followed by 55% of men and 53% of women who identified as bisexual, but the proportion of childless gay men and lesbian women was considerably lower (29% among gay men and 50% among lesbian women). Gay men and lesbian women also had the largest percentage of respondents unable to answer the question (17–24%).

Regression models

To explore in greater depth the effect that various factors have on the parenting desires of non-heterosexuals, we conducted binary logistic regression with the dependent variable ‘respondent wants/doesn’t want to have (more) children’ (0 = no, 1 = yes) (see Table 3). We estimated three models for each sexual identity group. Individuals with no reported sexual identity were excluded from this part of the analysis due to the low n .

To explore the intersection between gender and sexual identity and to estimate their unadjusted effect on parenting desires, we constructed a special model that includes the intersection of sex and sexual identity (see Table 4). The estimated regression models explained about 28% of the variability in parenting desires among heterosexual and bi-identified people and nearly 42% of the variability among the gay and lesbian-identified groups.

Table 2. Do you want to have (more) children (whether or not your own)?

		Heterosexuals	Bisexuals	Gays/Lesbians	Other/NA	Total
Men*	Yes	57.9%	52.1%	27.6%	50.0%	44.3%
	No	34.7%	38.5%	48.0%	18.8%	40.1%
	Don't know	7.4%	9.4%	24.4%	31.3%	15.6%
	Total %	100.0%	100.0%	100.0%	100.0%	100.0%
Women	Total (N)	96	95	127	16	334
	Yes	54.5%	46.9%	48.3%	50.0%	51.6%
	No	39.8%	45.8%	34.5%	18.8%	41.4%
	Don't know	5.6%	7.3%	17.2%	31.3%	6.9%
	Total %	100.0%	100.0%	100.0%	100.0%	100.0%
	Total (N)	319	177	29	23	548

Source: LGB Parenting 2019.

Note: * statistically significant differences between sexual identity groups, tested by χ^2 test ($\alpha = 0.01$).

Based on the literature review and the categorisation of factors influencing parenting desires suggested by Gato et al. [2017], the effect of the following explanatory variables was tested in our models:

- (i) *sociodemographic factors* (age, sex, education, sexual identity)
- (ii) *personal factors* (a strong family orientation,¹⁰ satisfaction with one's own sexual identity,¹¹ prejudiced against the parenting skills of gay men/lesbian women¹²)
- (iii) *relational factors* (social support,¹³ gay or lesbian parents among friends, already has kids, type of partnership)
- (iv) *contextual factors* (subjective assessment of the household's living standard, size of the place of residence, health issues, ART access conditions, legal aspects of same-sex parenting, considerations about the child being accepted in the community).

The above-mentioned factors were included in the models that were estimated separately for each sexual identity group, whereby it was possible to compare their effect on the parenting desires of straight, bisexual, and gay/lesbian-identified respondents (see Table 3).

Sociodemographic factors

Our results are consistent with the findings of numerous studies [e.g. Gato, Santos and Fontaine 2017] that have demonstrated the significant effects that sexual identity, sex, and age have on parenting desires. Stronger parenting desires are exhibited by heterosexuals (compared particularly to gays and lesbians) and young people (compared to older ones). Taking into account the raw effect of sex and sexual identity (i.e. without controlling for the effect of other variables), heterosexual-identified people have a 3.6 times higher chance and bisexual-iden-

¹⁰ Support the statement: 'Watching children grow up is the greatest joy in life.' (1= yes)

¹¹ The index summarises a battery on respondents' satisfaction with their sexual identity, ranging from 1 (completely satisfied) to 8 (completely dissatisfied); The battery included questions on concealing one's sexual identity; feeling sad about one's sexual identity; finding it morally wrong; being proud of it; and considering it an important part of oneself.

¹² Index constructed based on respondents' opinions on whether (i) two gay women and (ii) two gay men can rear a child as well as a heterosexual couple (1 = strongest support, 10 = lowest support for gay parenting capabilities).

¹³ We used a set of questions on different environments in which a person is usually able to find support and understanding: a partner, friends, and family members. The resulting index ranged from 1 (no support at all) to 4 (support from all of the above groups).

tified people have an almost 2.9 times higher chance of declaring they want to have (more) children compared to gay men and lesbian women (see Table 4).

Since sex and sexual identity are among the main factors we are interested in, we also modelled the interaction between sex and sexual identity, which allowed us to compare together all the combinations of these variables (see Tables 4 and 5). The model found that gay men had the weakest parenting desires among all the groups observed here. If we compare them with other groups of men, heterosexual men have about a 3.6 times higher chance and bisexual men about a 3 times higher chance of wanting (more) children when compared to gay men.

If we compare gay men to women, the most striking difference can be identified for heterosexual women, who have nearly a 9 times greater chance, and bisexual women who have a 7 times higher chance of wanting (more) children than gay men. Even lesbian women are 2.5 times more likely to want a child than gay men. Thus, in the Czech context, being a gay man seems to be very strongly associated with accepting childlessness.

As regards other sociodemographic factors, age seems to play an important role in all sexual identity groups. People aged 45+ are the least likely to want to have (more) children. People aged 25–30 have about a 14 times greater chance if they are heterosexual-identified, a 20 times greater chance if they are bi-identified, and a 36 times higher chance if they are gay/lesbian-identified to say that they do want to have (more) children compared to their counterparts aged 45–49 years. The fact that the age differences are the most pronounced within the gay/lesbian-identified group might support the hypothesis that the younger generation of gays and lesbians seem to accept parenthood as a possible part of their life to a much greater degree than those in the older generations [Riskind et al. 2013].

Education generally does not seem to play an important role in parenting desires in any of the sexual identity groups in our sample

Personal factors

As studies have demonstrated [e.g. Murphy 2013], many people, especially lesbians and gays, feel stigmatised and feel they may be inadequate and incapable of raising children, which may negatively affect their parenting desires. Our model suggests that while having a strong family orientation increases the chance of wanting (more) children, having prejudices about gay/lesbian parenting skills and the level of satisfaction with one's own sexual identity do not seem to play an important role in parenting desires, except in the case of heterosexual-identified people. Heterosexuals are the only group in which the rule applies that the greater a person's satisfaction with his or her sexual identity, the more likely it is that they will want to have children.

As for family orientation, our results suggest that it is in the gay/lesbian-identified group that this factor plays the most important role. While heterosexu-

al-identified people who agree with the statement that 'watching children grow up is the greatest joy in life' are twice as likely as those who disagree with this statement to want to have (more) children, bi-identified people are 2.9 times more likely. In the case of gay/lesbian-identified people, agreement with this statement is accompanied by a more than fivefold increase in the chance that they will want to have children.

Relational factors

Research shows that family and partnership status are among the key factors that influence the parenting desires of the general population [Sobotka 2004]. One frequently cited reason for childlessness is the absence of a suitable partner [Hašková and Vohlídalová 2014]. Although the effect of this factor was not found to be statistically significant in either of our sexual identity groups, the values of the regression coefficients suggest that being in a monogamous partnership, being a dating single, or being single in an 'open' relationship increases the chances that a person wants to have children, especially in the case of bi-identified and gay/lesbian-identified respondents.

One of the strongest predictors of the parenting desires of heterosexual-identified people proved to be the fact of whether a person already had children. Already having children reduces the chances that a person wants to have another child by about 60% in the case of heterosexual-identified people. This factor does not have a statistically significant effect in the case of bisexual and gay/lesbian-identified people, but the values of the regression coefficients suggest that the direction of this effect is very similar in this case as well. The fact of already having children may influence a person's willingness to have another child when faced with multiple constraints on doing so.

For LGB people the level of social support they have is very important in their considerations about becoming a parent [e.g. Gato, Santos and Fontaine 2017]. LGB pathways to parenthood are very complicated and LGB parents can be expected to face much greater social obstacles than straight parents. Surprisingly, the social support index does not have a statistically significant effect on parenting desires in our models. Having a lesbian or gay friend who is a parent does not seem to be significant either.

Contextual factors

Contextual factors, in general, seem to play a much more important role in the parenting desires of gay/lesbian-identified people than others. The household living standard proved to be an important factor in parenting considerations [Hašková et al. 2014] and was cited as one of the factors that influence the ability

Table 3. Binary logistic regression models: Do you want (more) children? (1 = yes, 0 = no) – first part

Factors	Categories	MODEL 1: heterosexual sexual identity	MODEL 2: bisexual sexual identity	MODEL 3: gay sexual identity
		Exp(B)	Exp(B)	Exp(B)
Constant (B)	X	0.053**	0.02***	0***
Sex	Men (<i>ref. cat.</i>)	1	1	1
	Women	0.91	0.499**	2.211
Education	Sig.	No	No	No
	Secondary without the school-leaving exam or lower (<i>ref. cat.</i>)	1	1	1
	Secondary with the school-leaving exam	0.729	0.477*	0.706
	Tertiary	0.953	0.688	0.548
Age	Sig.	***	***	**
	25–30	13.933***	20.293***	36.549**
	31–44	5.357***	12.197***	12.528**
	45–49 (<i>ref. cat.</i>)	1	1	1

Table 3. Binary logistic regression models: Do you want (more) children? (1 = yes, 0 = no) – second part

Factors	Categories	MODEL 1: heterosexual sexual identity	MODEL 2: bisexual sexual identity	MODEL 3: gay sexual identity
		Exp(B)	Exp(B)	Exp(B)
Personal factors	Strong family orientation	1	1	1
	Satisfaction with one's own sexual identity	Yes	2.094**	5.264***
			1.228*	1.178
		LG parenting prejudices	1.067	0.975
	Social support index	1.03	1.398*	0.861
Relational factors	LG parents within friends	No (ref. cat.)	1	1
	Already has kids	Yes	1.192	1.606
		No (ref. cat.)	1	1
	Partnership	Yes	0.339***	0.513
		Sig.	No	No
	Single, not dating (ref. cat.)	1	1	1
	Single, dating	1.12	2.114	1.844
	Monogamous relationship	1.243	1.655	1.797

Table 3. Binary logistic regression models: Do you want (more) children? (1 = yes, 0 = no) – third part

Factors	Categories	MODEL 1: heterosexual sexual identity	MODEL 2: bisexual sexual identity	MODEL 3: gay sexual identity
		Exp(B)	Exp(B)	Exp(B)
Living standard (subjective)	<i>Not good (ref. cat.)</i>	1	1	1
City size	Good	1.226	0.981	19.161**
	Sig.	No	No	**
	Village up to 5000 inhabitants	1.195	1.079	6.587***
	Small to medium-size city (up to 100 000 Inhabitants)	1.167	1.087	1.246
Contextual factors	<i>Big city over 100 000 inhabitants (ref. cat.)</i>	1	1	1
	ART conditions (considering)	1.495	1.548	3.158**
	<i>No (ref. cat.)</i>	1	1	1
	Legal aspects (considering)	1.554	0.518	0.773
Health (considering health issues – my or partner’s)	<i>No (ref. cat.)</i>	1	1	1
	Yes	1.411	1.433	1.063
	<i>No (ref. cat.)</i>	1	1	
	Acceptance of a child in the community (considering)	0.708	1.409	0.431
	<i>No (ref. cat.)</i>	1	1	1

Table 3. Binary logistic regression models: Do you want (more) children? (1 = yes, 0 = no) – fourth part

Model fit	Factors	Categories	MODEL 1: heterosexual sexual identity	MODEL 2: bisexual sexual identity	MODEL 3: gay sexual identity
			Exp(B)	Exp(B)	Exp(B)
Model fit	Nagelkerke R Square	X	0.281	0.288	0.419
	χ^2	X	***	***	***
	Hosmer-Lewenshof test	X	Not significant	Not significant	Not significant

Source: LGB Parenting 2019.

Note: Statistical significance of regression coefficients: * 10%, ** 5%, ***0.01%.

Table 4. Binary logistic regression model: Do you want (more) children? Unadjusted effect of sex and sexual identity and their intersection

Factors	Categories	B	Sig.	Exp(B)
Constant (B)	X	0.318	0.000	1.375
Sexual identity	Heterosexual	1.285	0.000	3.614
	Bisexual	1.05	0.000	2.857
	<i>Gay/lesbian (ref. cat.)</i>	0	x	1
Sex	<i>Men (ref. cat.)</i>	0	x	1
	Women	0.897	0.033	2.453
Sex*Sexual identity		x	0.063	x
	Women*bisexual	-1.034	0.032	0.356
	Women*heterosexual	-1.105	0.025	0.331

Source: LGB Parenting 2019.

Note: Model fit: Nagelkerke R Square 0.05, χ^2 stat. sig. (p = 0.000), Hosmer-Lewenshof test not stat. sig.

Table 5. B coefficients for all combinations of interacting variables (sex*sexual identity)

	B	Exp(B)
Gay man (ref. cat.)	0	1
Heterosexual man	1.285	3.614668
Bisexual man	1.05	2.857651
Heterosexual women	2.182	8.864017
Lesbian women	0.897	2.452235
Bisexual women	1.947	7.007633

Source: LGB Parenting 2019.

to afford costly ART (if available to lesbians or single women) [Gato et al. 2017; Berkowitz and Marsiglio 2007; Mezey 2008]. Our model suggests that the household living standard plays a statistically significant role, particularly for gay/lesbian-identified respondents. Those gay/lesbian-identified respondents who self-evaluated their living standard as good have a 19 times higher chance of wanting to have children than those who assessed their living standard as poor. For other sexual identity groups, the effect of this factor was not found to be significant.

The size of the person's place of residence seems to have a significant effect on the parenting desires of gay/lesbian-identified people only: people who live in villages with fewer than 5000 inhabitants display a stronger desire to have (more) children – about 6 times stronger than the level of interest observed among inhabitants of large cities (100 000+ inhabitants). This finding is rather surprising given that we would expect that the big-city environment (because of the anonymity it provides and the more tolerant attitudes towards the LGB community) would have a positive effect on the desire of gays and lesbians to have children. Simple descriptive statistics managed to shed some light on this unexpected finding: gay/lesbian people in our sample tend more often than others to live in places located in the vicinity of a big city. This means that, even if officially their place of residence is a small village, they live in locations that are closely connected to major cities, like Prague, Brno, or Pilsen.

Last but not least, for gay/lesbian-identified people, there is a statistically significant link between parenting desires and the fact of whether they would consider ART when they were thinking about becoming a parent. Those who would consider ART had a 3 times greater chance of wanting to have children than those who would not consider using ART.

Discussion and conclusion

Consistent with other studies, we found that parenting desires and the importance ascribed to starting a family are considerably lower in the lesbian, gay, and bisexual people population than among heterosexuals experiencing same-sex attraction. In this respect, sexual identity plays a much more important role among men than women [e.g. Baiocco and Laghi 2013; Costa and Bidell 2017; D'Augelli et al. 2007; Riskind and Patterson 2010].

The analysis demonstrated that the attitudes of bisexual-identified people are often closer to those of heterosexual-identified individuals than to gay/lesbian-identified people – a finding similar to what some other studies have shown [Leal, Gato and Tasker 2018; Riskind and Tornello 2017]. Compared to gays and lesbians, the pathways to parenthood of bisexual-identified people are much easier, especially if they have a partner of the opposite sex [Brewster et al. 2014].

Of the groups we studied, heterosexual-identified women are the ones who ascribe the most importance to having a family. They are followed by bisexual

women, heterosexual men, bisexual men, and lesbians. Gay men are the least likely to consider becoming a parent important.

Being a gay man is also one of the most important individual factors that determine whether or not people want children (less than 28% of gay men indicate wanting to have children, in contrast to 52% of bisexual and 57% of heterosexual men). Gay men are also more likely to be unable to answer the question of whether or not they want children (with more than 24% indicating they don't know, compared to less than 10% of bisexual- or heterosexual-identified individuals who were able to answer this). This finding suggests that surveys of parenting desires should provide a response option that would allow people to express their uncertainty on this question.

Our study also indicated a certain level of flexibility and fluidity of sexual identities, particularly for women, related to the consideration of being a parent in the Czech social and cultural context. Despite the strict data collection methods we used, self-identified lesbians were strongly under-represented in our dataset. In the light of research evidence on the construction of individual sexual identity within any wider cultural and social context [e.g. Carrillo and Hoffman 2018; Diamond 2005], we believe that this imbalance reflects the strictly hetero-normative perceptions of parenthood that prevail in Czech society. In a society where gay parenting is not legally recognised, where motherhood is a key aspect of female identity [Hašková and Zamykalová 2006], and where biological parenthood is strongly preferred, it seems understandable that, in the context of parenthood considerations, lesbian women self-identify as categories that offer them the potential to become a parent (i.e. as heterosexual or bisexual women). This hypothesis, however, would require further research.

The absence of the same effect among gay men is likely due to the much stronger link between childlessness and the gay identity and lifestyle. As Murphy [2013] states, the very question of parenthood is a relatively novel one for most gay men since they have largely internalised the view that being gay equates with being childless/childfree. Our findings, consistent with those of Sokolová [2009], suggest that this norm is still strong in the Czech Republic.

In Czech society, it is still easier for lesbian women than gay men to access ART to fulfil their dream of becoming a parent. Gay men therefore might be less likely from the very outset to give any consideration to the idea of becoming a parent. A study by a private healthcare facility [Turcan et al. 2020] mapping the increase in the desire to become a parent among lesbian women after registered partnerships were introduced in the legislation (in 2006) showed that lesbian women often adopt the strategy of having 'a fictitious partner'. This strategy is a way for lesbian women to legally undergo IVF. For gay men, pursuing the surrogacy option means travelling to a country where surrogacy is legal, which requires at least considerable financial resources and certain 'know-how'.

In addition to sexual identities, parenting desires are generally determined by other variables. Our analysis draws from the typology of factors that influence

parenting desires proposed by Gato et al. [2017]. They divided these factors into four groups: sociodemographic, personal, relational, and contextual. We focused on how these various types of factors interact with sexual identity and what roles they play for different sexual identity groups.

To conclude, the factors that increase the odds of wanting (more) children among all groups (lesbians/gays, bisexuals, and heterosexuals with same-sex attraction) are a younger age and having a strong family orientation. For gay and lesbian individuals, in particular, living in a small village with less than 5000 inhabitants (which proved to be mostly smaller suburban areas close to major cities) was also found to have a positive effect on parenting desires. It is possible that obtaining more affordable but also more spacious and better-quality housing is considered – and not just by gay and lesbian people – a necessary precondition for starting a family [Hašková et al. 2014]. In contrast, being older, already having children, and being single without a partner decrease the odds of wanting (more) children.

Contrary to our expectations based on our review of the literature, neither social support nor prejudices against lesbian and gay parenting skills had a statistically significant effect in our sample. While our data do not allow us to assess the net effect of the restrictive ‘anti-gay-family’ legislation and ‘institutionalised heterosexism’ in the Czech Republic, the data do suggest that the effect of these two factors is very strong. It is reflected both in the strong link between parenting desires and heterosexual (or bisexual) sexual identity and in the fact that some lesbian women probably claimed non-gay identity when taking part in research on parenting desires.

On the matter of generational change, young gay- and lesbian-identified people under the age of 30 generally express more of a desire to become parents than do their counterparts over the age of 45. However, the results are not conclusive about whether this is proof of a generational change [as identified by Riskind and Patterson 2010; Riskind et al. 2013] or whether it is simply a reflection of differences between people in different stages of the life course. However, this finding requires further research.

The level of detail that our analysis could go into was severely limited by the under-representation of self-identified lesbians in our sample, a drawback that would probably not have occurred if we had pursued convenience sampling. However, given the strict fieldwork procedures of our study, we believe that we have shed light on the subject matter by revealing an extremely important phenomenon, which is the apparent unwillingness of (some) lesbian women to identify as lesbians when they are talking about becoming a parent. At the same time, we have drawn attention to some of the limitations that quantitative research on this subject suffers from given the flexible and contextual nature of sexual identity. We have also demonstrated the possibility of using high-quality online panels, such as CNP, for sampling elusive populations. Moreover, online panels may be an affordable method of quantitative data collection in research on sensitive

topics (such as sexual identity, sexuality, etc.) that seeks to compare individual groups and maps the topic in its greater heterogeneity than community-based research would allow [Krueger et al. 2020].

The recent public debate on the issue of same-sex couples in the Czech Republic seems to be more inclined towards widening the rights of same-sex couples and making their status more equal to that of heterosexual ones [e.g. Sloboda 2021]. It would be therefore useful to study how these changes are reflected in the individual parenting desires and intentions of gay, lesbian, and bisexual individuals.

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Appendix: Details on sample structure and data collection

Table 1. First wave of data collection, CNP (6/2019)

	N
Respondents who completed the main questionnaire	796
Respondents who screened out (filtered out by the screening questions; i.e. heterosexual without same-sex attraction)	4630
Respondents who stopped filling in the main questionnaire	107
Total respondents who answered the screening questionnaire	5533

Note: 12 655 addressed individuals aged 25–49.

Table 2. Second wave of data collection, Dialog Panel (7/2019)

	N
Respondents who completed the main questionnaire	86
Respondents who screened out (filtered out by the screening questions; i.e. heterosexual with or without same-sex attraction)	1401
Respondents who stopped filling in the main questionnaire	60
Total respondents who answered screening questionnaire	1547

Note: 3380 addressed individuals aged 25–49.

Table 3. Original quotas and sociodemographic structure of addressed individuals and the final sample – first part

Variables		Structure of addressed individuals (1st wave of data collection) (in %)	Structure of addressed individuals (2nd wave of data collection) (in %)	Structure of the final sample	Quotas (based on the StemMark Internal tables -CZSO/LFS 2019) (in %)	Differences: quotas vs final sample
Sex	Men	36	59	38	49	-11
	Women	64	41	62	51	11
Age	25–29	27	27	19	21	-2
	30–44	61	64	62	63	-1
	45–49	11	9	19	16	3
Education	Primary	3	0	3	4	-1
	Secondary without school-leaving exam	21	22	22	28	-6
	Secondary with school-leaving exam	42	43	42	42	0
	Tertiary	33	35	32	26	6
	Up to 999 inhabitants	14	14	15	16	1
Size of the place of residence	1 000–1 999	18	14	19	20	-1
	5 000–19 999	19	16	19	19	0
	20 000–99 999	24	26	22	20	2
	100 000+	25	30	25	25	0

Table 3. Original quotas and sociodemographic structure of addressed individuals and the final sample – second part

Region	Variables	Structure of addressed individuals (1st wave of data collection) (in %)	Structure of addressed individuals (2nd wave of data collection) (in %)	Structure of the final sample	Quotas (based on the StemMark Internal tables -CZSO/LFS 2019) (in %)	Differences: quotas vs final sample
Praha		12	15	12	14	-2
Central Bohemia		14	9	14	13	1
South Bohemia		6	2	6	7	-1
Pilsner Region		4	8	5	5	0
Karlovy Vary Region		2	1	2	3	-1
Ústí nad Labem Region		9	14	9	8	1
Liberec Region		4	3	3	4	-1
Hradec Králové Region		5	5	5	4	-1
Pardubice Region		5	2	5	5	0
Vysočina Region		5	2	5	5	0
South Moravia		11	17	12	10	2
Olomouc Region		6	7	6	6	0
Zlín Region		5	2	5	5	0
Moravian-Silesian Region		12	10	12	10	2
Total		100	100	100	100	x

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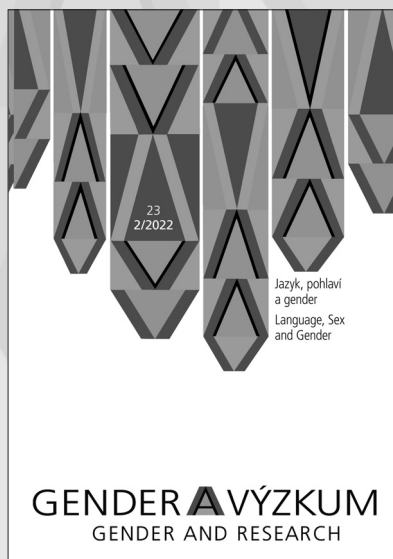
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Social Capital and Workers' Job Prospects in the MENA Region*

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Abstract: Social networks and collective trust have been studied in relation to civil uprisings such as the Arab Spring events of 2011. Social capital is also an important factor in the Middle East and North African (MENA) labour markets, where 'wasta' family connections are said to affect workers' opportunities. Little is known, however, about MENA citizens' social capital and its composition and distribution across socio-economic groups. As an advanced foundation on which to build future analyses, we propose a stochastic approach for measuring people's social capital using Bayesian clustering, based on three dimensions: level of social activity, quality of social networks, and trust. Applying the method to the 2000–2014 World Values Surveys for 16 MENA countries, we describe the composition and distribution of workers' social capital within and between countries, and estimate ordered-probability regressions of workers' employment outcomes as a function of the dimensions of social capital, workers' demographics, and subjective health assessment. We find that, among the three dimensions of social capital, social trust is most clearly conducive to the employment and full-time status of both genders. The level of social activity is associated with more autonomous, intellectual and creative occupations among men, but only with more creative occupations among women. Higher-quality social networks are associated with more autonomous jobs, but also less creative ones. Interestingly, trust is associated with non-autonomous, manual, and routine jobs. In creative jobs favoured by the Fourth Industrial Revolution, workers are selected from those with higher socializing levels but inhibited networks and trust.

Keywords: employment vulnerability, Middle East and North Africa, social capital, World Values Surveys

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Motivation

Much has been written about the precariousness of employment conditions in the Middle East and North African (MENA) region, particularly among marginally attached groups, including fresh graduates and women [e.g. Ozturkler 2014; Fehling et al. 2016; Chen and Harvey 2017]. Numerous empirical studies have assessed the sources of the inequitable and unbalanced state of the labour markets [e.g. Assaad 2014; Krafft and Assaad 2016], highlighting the role of market barriers and unfair competition between formal and informal establishments, low labour productivity, ineffective skill acquisition, and false expectations of labour market prospects [Assaad et al. 2018]. These studies have largely overlooked the role of social capital beyond mentioning the benefits of political connections among firms allied with the ruling regimes [Diwan et al. 2016, 2019; Aly and Abdel-Latif 2018; Francis et al. 2018; Kubinec 2018], the role of workers' *wasta* in organisations' recruiting [Marktanner and Wilson 2016; Ta'Amnha et al. 2016; Alsarhan and Valax 2021; Alsarhan et al. 2021], or the influence of parental attributes, resources, and connections on workers' prospects [AlAzzawi and Hlasny 2019, 2022a,b].

The concept of social capital has itself remained out of the domain of economics until recently. Its relevance to individuals' and communities' wellbeing has traditionally been investigated in sociology [Coleman 1994; Portes 1998; Putnam 2000; Siisiäinen 2003; Antoci et al. 2007; Fukuyama 2001; Helliwell et al. 2017a]. Bourdieu [1986: 248–249] defined it as 'the aggregate of the actual or potential resources which are linked to [...] membership in a group – which provides each of its members with the backing of the collectivity-owned capital'. Social capital is a multidimensional attribute of individuals and their community that interacts with individuals' human and physical capital to produce various real lifetime outcomes. Social capital includes individuals' soft skills, such as trust in public and market institutions, sociability in particular social contexts, and size and quality of individuals' social networks. Different individuals accumulate different amounts and forms of social capital and collect different economic and non-economic benefits from their investments [Knack and Keefer 1997; Astone et al. 1999].

Only in the past two decades, economists have gradually embraced social capital upon recognising that factors besides the accumulation of hard skills and physical capital affect individuals' economic performance and life satisfaction [Helliwell et al. 2017b]. Even at the societal level, social capital has been found to correlate with economic development [Fukuyama 2001; Pérez García et al. 2008]. Individuals' sociability and social networking affect their labour-market, financial, and other lifetime outcomes, their welfare, as well as the outcomes of their offspring [Hofferth et al. 1998] and societal outcomes [DiPasquale and Glaeser 1999]. Individuals' norms and the values they attribute to their possessions and outcomes affect their incentives to invest, as well as their life satisfaction. Hence, social capital has multiple roles in individuals' pursuit of their career and lifetime goals, and in the functioning of communities and societies.

In MENA countries, ethnic and cultural homogeneity facilitate the formation of social capital and markets' reliance on it for conducting transactions, such as matching workers with employers [Alesina and LaFerrara 2000]. The role of people's social networks and social media's mobilisation of them has been highlighted in relation to the dynamics of the Arab Spring events of 2011 and their suppression in the following years. To this day, the use of social media is curtailed by the authorities in much of the region. Even before the Arab Spring, the 'Arab inequality puzzle' attracted worldwide interest for the apparent incongruity between the growing social discontent and the evidence of rather equitable distributions of surveyed economic outcomes. Academic attention shifted to niche facets of socio-economic inequality such as subjective perceptions of inequality, performance of reference groups such as top earners, and the distribution of physical capital [Hlasny and AlAzzawi 2019; Hlasny 2020; ESCWA 2020, 2022]. Social capital is also an important factor in labour and procurement markets, particularly in the informal MENA economies where family resources and connections (*wasta*) have been found to affect young workers' employment prospects and to give rise to significant inequality of opportunities [AlAzzawi and Hlasny 2022a,b]. Given the latent nature and multidimensionality of social capital, the following elusive questions endure: What is social capital composed of, and how is it distributed across MENA countries' populations? What determines the regional levels and between-group gaps in social capital? And how do they interact with workers' economic prospects and outcomes?

Social capital is unobservable and must be estimated indirectly. Yet, existing economic literature provides limited guidance on how to incorporate social capital in economic analyses, particularly in the world's understudied regions. Social capital is still largely treated as a sociological construct, and few studies link social capital acquisition to individuals' economic decisions and outcomes. Investigative methods for the estimation of social capital are lacking, particularly compared to the strides recently made in measuring individuals' human capital, wealth, or even happiness. Moreover, the vast bulk of literature assumes individuals' social capital to be exogenously given, and few existing works consider its endogeneity and the mechanisms of its formation. Our study contributes on this front.

In the MENA region, the distribution of social capital and its implications for the economic and political status quo have received surprisingly little attention. The nature of MENA citizens' social engagement, the distribution of social-capital dimensions across various socio-economic groups and countries, and the evolution of the distribution over time are all unclear. Some MENA countries have been chronically understudied even in relation to their basic labour market functioning and workers' fates, such as Iran (a notable exception is Egel and Salehi-Isfahani [2010]).

This paper aims to contribute to filling these multiple gaps. We propose an advanced Bayesian approach for clustering indicators of three dimensions of

social capital – level of social activity, social networks, and trust – to estimate three unidimensional indices of each dimension of social capital, as an alternative to the more commonly applied weighted-sum, average, principal component, finite-mixture imputations, or deterministic clustering [Hlasny and Lee 2020]. We describe the composition of social capital by its dimensions, and their distribution within and across 16 MENA countries over the span of the years 2000–2014. We then investigate how the dimensions of social capital affect workers' employment outcomes.

The rest of the study is organised as follows. The next section introduces the proposed methodology and data used. The section following that presents the key results, and the last section concludes with suggestions for public policy and for future investigations.

Methods and data

This study applies the lessons from the literatures on social-capital modelling and on the MENA-region labour markets to investigate the effect of workers' social capital on their labour market outcomes. We contribute by explicitly accounting for three dimensions of workers' social capital in the regressions of workers' employment status. The key hypothesis evaluated in this study is that, across MENA labour markets, workers' multiple facets of social capital all exert positive effects on workers' employment outcomes, even after controlling for workers' other characteristics and backgrounds. Due to the latent nature of social capital and the categorical nature of employment outcomes, this exercise requires advanced treatment, which is described below.

Imputing social capital by non-hierarchical Bayesian clustering

Social capital is unobservable, and its empirical measurement depends on how we define it conceptually. In this paper, we classify social capital by its three distinct dimensions as recognised in the literature [see the references in Hlasny and Lee 2020]: level of social activity, perceived quality of one's social network, and the degree of trust in social institutions. These three dimensions of social capital must be imputed and used in regressions in tandem.

The level of social activity covers a person's active engagement with political parties and environmental, professional, humanitarian, or other social organisations. Also, it encompasses the frequency of one's meetings with friends, parents, or relatives, active or passive participation in sports, culture, and community or religious organisations, and attendance at religious services.

The quality of one's social network covers how often one receives information from friends or colleagues, to what extent one regards oneself as a member of

a local community or a citizen of one's country, and one's membership in professional associations. Finally, trust in social institutions gauges an individual's view on whether most people can be trusted, and how much one trusts one's family, neighbours, long-time contacts, first-time acquaintances, or people of another religion. It also encompasses how much one trusts the media, government, political parties, and major companies, and how confident one is in the justice system/courts, charitable/humanitarian organisations, banks, and universities. Table 1 lists the variables for the respective dimensions of social capital used in our clustering exercise. Their detailed definitions are documented by Inglehart et al. [2014].

To define the (dis)similarities in individuals' profiles of social activity (social network or trust, respectively) and identify patterns in data, we constructed a weighted index of the latent value of this variable for individuals using the Gaussian mixture model by means of Bayesian clustering as proposed by Franzen [2006].¹

Bayesian clustering takes a stochastic view of the determination of workers' socialising, social networks, and trust, respectively, and allows us to make probability-weighted predictions of individuals' true values. To this end, we group the values of the various social-capital indicators into distinct clusters, using their observed joint distribution. In all the clusters we identify the representative datapoints or centroids. We then use the Bayesian approach to estimate the probabilities of individuals' belonging to each cluster and predict the weighted index of the dimension of social capital by multiplying the estimated probabilities by the mean value for each cluster (centroid).

The strength of Bayesian clustering relative to conventional deterministic imputation (including parametric finite mixture models, and principal component analysis) is that it allows for uncertainty about how to classify and treat each individual, meaning that the individual may have come from any cluster only subject to different probabilities. Bayesian clustering does not pinpoint de-

¹ This is a model-based non-hierarchical clustering technique based on a Markov Chain Monte Carlo (MCMC) method. This technique is more advantageous than the usual model-based clustering using Expectation Maximisation (EM) algorithms, since MCMC is known to be empirically 'preferable over EM algorithm in recovering the parameters of mixture models, in particular if the shape of the likelihood surface is problematic, exhibiting ridges, flat regions and/or saddle points' [Dias and Wedel 2004]. Although the data are of a categorical scale, we consider using scores for the ordinal predictors following prior literature [Labovitz 1970, 1971; Mayer 1971; O'Brien 1979; Brockett 1981; Golden and Brockett 1987; Agresti 2002; Chen and Wang 2014]. That is, we transform the ordinal data into an interval scale by assigning scores so that more general statistical approaches can be used. Moreover, we interpret the predictors' scale as continuous and impute missing values in the dimensions of social capital by the average of individuals with similar socioeconomic characteristics: workers with the same survey year, age, sex and education. This way we can expand the data spectrum to be continuous, and we can apply the Gaussian mixture model by Bayesian clustering.

Table 1. Summary statistics of social capital indicators by country group & gender – first part

	Gulf Cooperation Council (GCC)		Middle income		Low income	
	Men	Women	Men	Women	Men	Women
Number of observations	1915	1593	12 192	13 668	667	685
<i>Social capital dimension 1: Level of social activity</i>						
Active level in religion	0.271 (0.616)	0.216 (0.566)	0.086 (0.365)	0.069 (0.330)	0.192 (0.504)	0.165 (0.472)
Active level in sports or recreation	0.287 (0.626)	0.176 (0.508)	0.105 (0.408)	0.060 (0.305)	0.202 (0.536)	0.080 (0.302)
Active level in art, music, and education	0.183 (0.519)	0.218 (0.575)	0.051 (0.284)	0.052 (0.287)	0.097 (0.361)	0.080 (0.321)
Active level in a political party	0.000 (0.000)	0.000 (0.000)	0.054 (0.284)	0.028 (0.199)	0.445 (0.728)	0.175 (0.460)
Active level in an environmental organisation	0.167 (0.501)	0.129 (0.436)	0.035 (0.224)	0.026 (0.196)	0.069 (0.297)	0.067 (0.283)
Active level in a professional organisation	0.253 (0.592)	0.194 (0.541)	0.069 (0.321)	0.040 (0.244)	0.190 (0.512)	0.092 (0.340)
Active level in a humanitarian organisation	0.263 (0.619)	0.233 (0.585)	0.079 (0.357)	0.064 (0.321)	0.177 (0.501)	0.140 (0.434)
Active level in any other organisation	0.040 (0.253)	0.042 (0.253)	0.014 (0.152)	0.015 (0.155)	0.033 (0.202)	0.019 (0.157)
How often a respondent discusses political matters with friends	0.264 (0.548)	0.293 (0.603)	0.318 (0.588)	0.210 (0.478)	0.000 (0.000)	0.000 (0.000)

Table 1. Summary statistics of social capital indicators by country group & gender – second part

	Gulf Cooperation Council (GCC)		Middle income		Low income	
	Men	Women	Men	Women	Men	Women
Number of observations	1915	1593	12 192	13 668	667	685
How often respondent attends religious services	0.835 (0.944)	0.623 (0.860)	1.302 (0.871)	0.799 (0.850)	1.856 (0.469)	0.572 (0.825)
How often respondent spends time with friends	0.543 (0.882)	0.582 (0.898)	0.58 (0.895)	0.482 (0.837)	0.000 (0.000)	0.000 (0.000)
Frequency spending time with parents or other relatives	0.527 (0.867)	0.575 (0.891)	0.595 (0.897)	0.541 (0.873)	0.000 (0.000)	0.000 (0.000)
Frequency spending time with people at a sports, cultural, or communal organisation	0.351 (0.715)	0.225 (0.578)	0.107 (0.425)	0.045 (0.281)	0.000 (0.000)	0.000 (0.000)
Frequency spending time with people at your church, mosque, or synagogue	0.478 (0.829)	0.288 (0.657)	0.314 (0.711)	0.134 (0.480)	0.000 (0.000)	0.000 (0.000)
<i>Social capital dimension 2: Network</i>						
Information source: talk with friends or colleagues	1.271 (0.885)	1.190 (0.911)	0.463 (0.830)	0.435 (0.806)	1.702 (0.646)	1.463 (0.807)
I see myself as a citizen of the country	1.055 (0.896)	1.068 (0.904)	0.748 (0.855)	0.904 (0.895)	1.520 (0.607)	1.364 (0.610)
I see myself as a member of my local community	0.989 (0.894)	1.009 (0.885)	0.852 (0.904)	0.796 (0.853)	1.398 (0.604)	1.208 (0.609)
I see myself as someone who is outgoing, sociable	0.753 (0.926)	0.527 (0.835)	0.351 (0.729)	0.356 (0.727)	1.811 (0.511)	1.364 (0.610)

Table 1. Summary statistics of social capital indicators by country group & gender – third part

	Gulf Cooperation Council (GCC)		Middle income		Low income	
	Men	Women	Men	Women	Men	Women
Number of observations	1915	1593	12 192	13 668	667	685
<i>Social capital dimension 3: Trust</i>						
How much do you trust your family?	1.235 (0.903)	1.170 (0.902)	0.906 (0.983)	0.982 (0.984)	1.905 (0.349)	1.746 (0.590)
How much do you trust television?	0.856 (0.783)	0.932 (0.796)	0.578 (0.718)	0.707 (0.747)	0.363 (0.570)	1.874 (0.396)
How much do you trust the government?	0.756 (0.816)	0.755 (0.842)	0.613 (0.771)	0.652 (0.776)	0.374 (0.633)	0.394 (0.583)
How much do you trust political parties?	0.000 (0.000)	0.000 (0.000)	0.237 (0.529)	0.229 (0.518)	0.162 (0.417)	0.431 (0.634)
How much do you trust major companies?	0.810 (0.771)	0.884 (0.777)	0.414 (0.649)	0.420 (0.645)	0.272 (0.515)	0.190 (0.450)
How much do you trust your neighbourhood?	0.791 (0.794)	0.660 (0.739)	0.576 (0.779)	0.611 (0.779)	1.165 (0.684)	0.242 (0.496)
How much do you trust people you know personally?	0.814 (0.801)	0.806 (0.805)	0.550 (0.766)	0.594 (0.774)	1.022 (0.679)	0.941 (0.698)
How much do you trust people you meet for the first time?	0.347 (0.576)	0.307 (0.554)	0.117 (0.357)	0.121 (0.359)	0.198 (0.424)	0.200 (0.438)
How much do you trust people of another religion?	0.390 (0.593)	0.359 (0.571)	0.170 (0.424)	0.162 (0.411)	0.180 (0.428)	0.118 (0.339)

Table 1. Summary statistics of social capital indicators by country group & gender – fourth part

	Gulf Cooperation Council (GCC)		Middle income		Low income	
	Men	Women	Men	Women	Men	Women
Number of observations	1915	1593	12 192	13 668	667	685
Confidence level in justice system/courts	0.896 (0.863)	0.861 (0.869)	0.389 (0.693)	0.404 (0.701)	0.369 (0.608)	0.434 (0.628)
Confidence level in charitable or humanitarian organisations	0.763 (0.804)	0.716 (0.803)	0.429 (0.701)	0.489 (0.736)	0.495 (0.643)	0.535 (0.671)
Confidence level in banks	0.624 (0.774)	0.642 (0.783)	0.205 (0.525)	0.199 (0.510)	0.334 (0.580)	0.363 (0.625)
Confidence level in universities	0.707 (0.794)	0.720 (0.813)	0.225 (0.542)	0.229 (0.547)	0.584 (0.643)	0.602 (0.682)

Notes: Authors' analysis based on the World Values Survey, waves 4–6.

terministically a specific cluster that a given individual must be coming from, and it produces more robust predictions accompanied by the estimates of the associated uncertainty [Franzen 2006; Muller et al. 2009].

The stochastic technique allows us to arrive at more generalised predictions of social engagement for any individual or any profile of behaviour, and even allows us to identify probabilistic outliers – something that deterministic imputation methods could not do in the absence of information on how to evaluate distances across distinct profiles of social capital. Moreover, compared to hierarchical clustering approaches, our non-hierarchical clustering adopts the information structure from the unstructured but *proper* prior distributions of the variables of interest, and is expected to be more efficient [Franzen 2006]. (The technical specification of the method is presented in the appendix.)

Setting the count of clusters

Our clustering approach proceeds from a pre-set number of clusters that appears consistent with the peaks and other features in our data. For each dimension of social capital, we compute a simple average of workers' values for all available indicators and plot a distribution across workers. (The total sum of values for all indicators is used as an alternative.) We observe that the level of social activity and the quality of social networks and trust exhibit a large number of distinct peaks across workers. We can interpret these initial counts as the maximum number of clusters for each dimension of social capital, since it would be unlikely to identify clusters beside those marked by the peaks in the raw data. However, these numbers may not represent the true distinct profiles of social engagement across individuals – in terms of their types and degrees – and may not be efficient for the performance of the structural model of employment effects. The reason is that the set of clusters may exhibit redundancy in terms of the composition of indicator values in each cluster. We thus rely on the Bayesian Information Criterion (BIC) to identify the most efficient clustering and the optimal number of clusters for each dimension of social capital. The BIC has several statistical strengths: it chooses the most parsimonious model because it imposes a penalty on complex models with many parameters [Bishop 2006] and in large datasets it selects the correct model with a probability of one [Hastie, Tibshirani and Friedman 2016].

Estimating employment effects

Using the imputed values of the three dimensions of social capital, we can estimate their effects on individuals' employment outcomes. Because of the categorical nature of the alternative employment outcomes and the ordinal relations between them, we applied ordered probabilistic regression models. Moreover, because individuals' social engagement may be endogenous to their labour mar-

ket choices and attainments, we attempt to extract only the exogenous parts of the social-capital dimensions through an instrumental variable (IV) approach. Our structural regression model thus consists of two stages: in the first stage, we estimate linear IV regressions predicting the values of the three dimensions of social capital using exogenous factors. In the second stage, we estimate probabilistic (probit and ordered probit) regressions of the alternative employment outcomes on the instrumented values of social-capital dimensions.

For the dependent variable in our structural model, workers' employment outcomes come from an ordinal spectrum of categorical statuses, measured using several alternative indicators. As a benchmark, we use the binary indicators *employed vs non-employed*_{it} (model A), where the former group includes full-/part-time wage workers and the self-employed, while the latter includes the unemployed actively searching for employment and those out of the labour force (including housewives). Since in the MENA region the vast majority of adult men are employed, but at the same time many men and some women are underemployed, we next use a more regionally tailored dependent variable: *full-time wage vs part-time wage/self-employed*_{it} workers (model B). In both of these specifications, the latter status (i.e. non-employed, part-time/self-employed) is considered the baseline or natural outcome. This is because this kind of precarious status – less rewarding in terms of compensation and benefits and overall less desirable to most workers – is widespread among new labour market entrants [Hlasny and AlAzzawi 2022].

Digging deeper into the nature of people's work, we consider an ordered categorical indicator of how autonomous one's job is on an ordinal scale of 1–10 (model C: no independence 1 – complete independence 10), allowing for heterogeneous effects of the social capital dimensions across jobs with different degrees of autonomy. Similarly, we consider ordered categorical indicators for how intellectual (model D: mostly manual 1 – mostly intellectual 10) and creative (model E: mostly routine 1 – mostly not routine 10) workers' tasks are in their main jobs. Each of these three dependent variables is thus on a scale from 1 to 10, where 1 is the least preferred outcome and is the baseline in the ordered-probit regressions. Coefficients in the models can be interpreted as the increases in the workers' prospect of exiting precarious and dreary positions for steadier and more stimulating ones.

In the first stage, we run an ordinary least squares (OLS) regression for the following equation:

$$SC_{ij} = Z'_i\delta + X'_{it}\gamma + v_i, \quad j = 1, 2, 3; i = 1, 2, 3, \dots, n.$$

In the second stage, we run a probit model for the binary dependent variable with the equation

$$Employment_i = \widehat{SC}_{i1}\beta_1 + \widehat{SC}_{i2}\beta_2 + \widehat{SC}_{i3}\beta_3 + X'_i\alpha + u_i, \quad i = 1, 2, 3, \dots, n,$$

with the predicted probabilities

$$P(\text{Employment}_i = 1 | \widehat{SC}_{i1}, \widehat{SC}_{i2}, \widehat{SC}_{i3}, X_{2i}) = \Phi(\widehat{SC}_{i1}\beta_1 + \widehat{SC}_{i2}\beta_2 + \widehat{SC}_{i3}\beta_3 + X'_{2i}\alpha),$$

or we estimate an ordered probit model for the ordinal dependent variable with

$$\begin{aligned} P(\text{Nature of Jobs}_i = m | \widehat{SC}_{i1}, \widehat{SC}_{i2}, \widehat{SC}_{i3}, X_{2i}) \\ = \Phi(\lambda_m - \widehat{SC}_{i1}\beta_1 - \widehat{SC}_{i2}\beta_2 - \widehat{SC}_{i3}\beta_3 - X'_{2i}\alpha) \\ - \Phi(\lambda_{m-1} - \widehat{SC}_{i1}\beta_1 - \widehat{SC}_{i2}\beta_2 - \widehat{SC}_{i3}\beta_3 - X'_{2i}\alpha). \end{aligned} \quad \begin{aligned} i &= 1, \dots, n; \\ m &= 1, \dots, 10. \end{aligned}$$

Here SC_{ij} ($j = 1, 2, 3$) denotes the j^{th} dimension of social capital. One's level of *social activity* is the first type ($j = 1$); one's accumulated value or gain from forming a *network* is the second ($j = 2$); and one's *trust* in various types of institutions is the third ($j = 3$). Z_{ij} denotes instrumental variables for social capital and X_{1i} denotes the exogenous regressors used in instrumenting, while \widehat{SC}_{ij} indicates the predicted values of the dimensions of social capital. The disturbance terms (u_i, v_i) are assumed to be bivariate normal as $N\left(\begin{pmatrix} 0 \\ 0 \end{pmatrix}, \begin{pmatrix} \delta_u^2 & \delta_{uv} \\ \delta_{vu} & \delta_v^2 \end{pmatrix}\right)$, where σ_{uv} may be nonzero.

In the first-stage linear regressions, X_{1i} includes the individual's education, subjective health status, age, age squared, town size (small ~2000–5000; intermediate 5000–20 000; medium 20 000–100 000; large 100 000+), country income level (Gulf Cooperation Council, middle-income country, or low-income country²), and a linear time trend. These factors are assumed to be exogenous in the first-stage model. This appears to be justified theoretically for most variables: Education up to the incomplete secondary level is exogenous by default, since it is prescribed by government policy. Health is also likely exogenous since it is influenced by workers' demographics (age, gender) and physical attributes.

² The most fundamental way to classify the economies and labour markets in the MENA region is according to the national level of economic development in terms of real purchasing-power-parity adjusted incomes. Incidentally, this approximately agrees with the traditional geographic grouping of MENA countries. The United Nations and the World Bank classify the Gulf Cooperation Council countries in the Arabian Peninsula as high income (here: Bahrain, Kuwait, Qatar, Saudi Arabia); the vast majority of the region across Maghreb and Mashreq subregions as middle-income countries (here Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Tunisia, Iran, Turkey); and a handful of impoverished and conflict-affected countries mostly in East Africa as low-income countries (here Palestine, Yemen). These three country groups have differently organised labour markets, with different distributions of occupations and employment types, suggesting that workers' attributes including social capital may be associated differently with the levels on the job ladder.

In the second-stage probabilistic regressions, the main independent variables of interest are the three instrumented dimensions of social capital, and the set of controls (X_{2i}) includes the same variables as in the first stage, with several exceptions: education level is subdivided into more detailed levels, and one's marital status (married, divorced/separated, or single/never married) is added. The main impacts of interest are the marginal effects of the predicted dimensions of social capital, derived from their second-stage coefficients.

Acknowledging the notorious gender gaps in the regional labour markets, the models are estimated separately for each gender to avoid biases in the estimated effects, inefficiency due to heteroskedasticity, and other potential issues.

Data

The paper relies on 25 national surveys from 16 countries taken from waves 4 (years 1999–2004; 10 584 individuals), 5 (years 2005–2008; 8187 individuals), and 6 (2010–2014; 11 980 individuals) of the World Values Survey (WVS) database. We focus on the MENA region: Algeria, Bahrain, Egypt, Iraq, Iran, Jordan, Kuwait, Lebanon, Libya, Morocco, Palestine, Qatar, Saudi Arabia, Tunisia, Turkey, and Yemen. Since our dependent variables are economic outcomes, we confine our sample to people 25–55 years of age, as the prime working age according to one's life cycle, when the vast bulk of individuals' economic activity takes place; 30,751 individual-level observations are available overall. Full-time wage workers (32.97%) and housewives (32.62%) are the largest groups among men and women, respectively, followed by the self-employed (13.53%), part-time wage workers (10.08%), the unemployed (6.66%), the retired (2.55%), and students (1.57%).

Results

The optimal number of clusters and their properties

Figure 1 reveals that the distribution of workers' social activity, the quality of their social networks, and their trust levels have 15, 9, and 23 distinct modes or groupings, respectively.

Figure 2 illustrates the Bayesian Information Criteria (BIC) corresponding to all the alternative counts of clusters for each social capital dimension. The optimal counts of clusters are found where BIC is minimised, that is, at 15 for the level of social activity (that is, the maximum number considered; BIC=−2 516 700), 5 for the quality of social networks (BIC=−49 002), and 20 for trust (BIC=−369 710), respectively. A reassuring feature in Figure 2 is that the BIC evolves in a consistent direction, near monotonically and at a diminishing rate for the level of social activity and trust, and approaches a U shape for the quality of social networks. This provides some validation for the selected count of clusters with respect to neighbouring values.

Figure 1. Distribution of each dimension of social capital

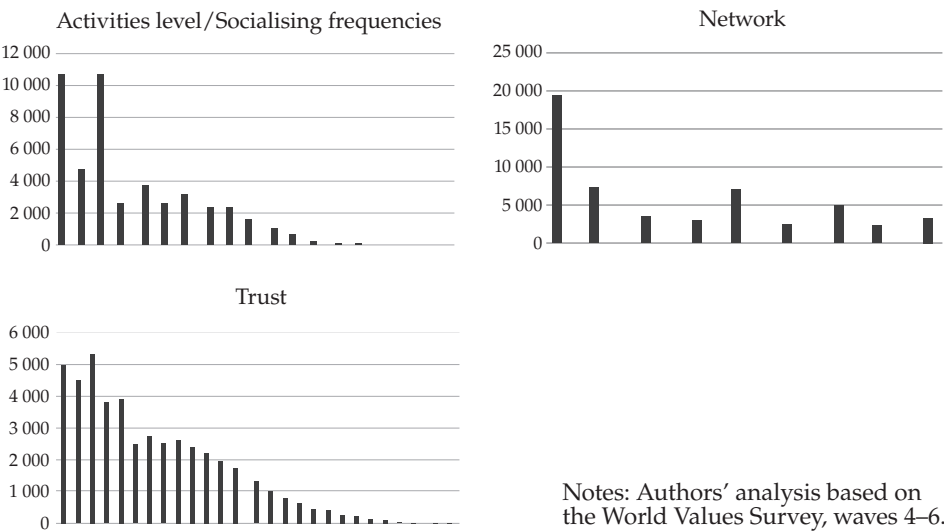


Figure 2. Bayesian Information Criteria by the count of clusters

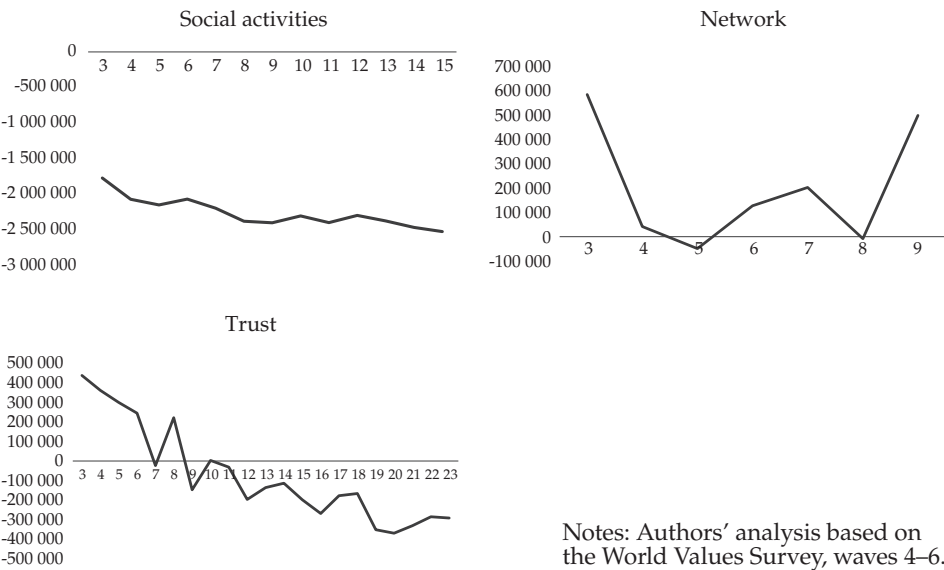


Table 2. Representative (average) values of social capital dimensions, by country-group and gender

	Women			Men		
	Activity	Network	Trust	Activity	Network	Trust
Gulf Cooperation Council (GCC; Bahrain, Kuwait, Qatar, Saudi Arabia)	0.2681	1.0268	0.5740	0.3112	1.0794	0.5878
Middle-income (Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Tunisia, Iran, Turkey)	0.1902	0.6211	0.4524	0.2593	0.5965	0.4255
Low-income and conflict-affected (Palestine, Yemen)	0.1172	1.3801	0.6936	0.2195	1.4704	0.5818

Table 3. Average probabilities of belonging to each social capital cluster, by country-group and gender

Countries	Gulf Cooperation Council (GCC)						Middle-income						Low-income and conflict-affected					
	Bahrain, Kuwait, Qatar, Saudi Arabia			Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Tunisia, Iran, Turkey			Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Tunisia, Iran, Turkey			Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Tunisia, Iran, Turkey			Palestine, Yemen			Palestine, Yemen		
#	Women		Men		Women		Men		Women		Men		Women		Men		Women	
Clusters	Activity	Network	Trust	Activity	Network	Trust	Activity	Network	Trust	Activity	Network	Trust	Activity	Network	Trust	Activity	Network	Trust
1	0.325	0.011	0.641	0.230	0.003	0.658	0.313	0.298	0.378	0.175	0.271	0.369	0.488	0.019	0.737	0.025	0.007	0.725
2	0.007	0.308	0.001	0.010	0.370	0.001	0.119	0.163	0.003	0.054	0.136	0.003	0.102	0.774	0.007	0.027	0.621	0.003
3	0.015	0.310	0.000	0.024	0.281	0.000	0.016	0.430	0.004	0.054	0.467	0.004	0.000	0.000	0.001	0.000	0.000	0.000
4	0.009	0.070	0.000	0.007	0.039	0.000	0.000	0.020	0.002	0.000	0.020	0.000	0.000	0.015	0.000	0.000	0.013	0.000
5	0.127	0.300	0.003	0.040	0.307	0.005	0.228	0.089	0.000	0.184	0.106	0.000	0.000	0.193	0.000	0.000	0.358	0.000
6	0.000	0.000	0.000	0.000	0.000	0.000	0.008	0.008	0.094	0.001	0.094	0.094	0.000	0.000	0.001	0.000	0.000	0.000
7	0.015	0.000	0.000	0.005	0.005	0.000	0.025	0.000	0.000	0.056	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
8	0.062	0.005	0.005	0.098	0.003	0.003	0.161	0.000	0.000	0.263	0.000	0.000	0.153	0.000	0.000	0.514	0.000	0.000
9	0.246	0.000	0.000	0.319	0.000	0.000	0.092	0.001	0.001	0.120	0.001	0.001	0.247	0.000	0.000	0.399	0.000	0.000
10	0.016	0.000	0.000	0.008	0.001	0.001	0.004	0.005	0.005	0.003	0.005	0.005	0.003	0.009	0.009	0.001	0.021	0.000
11	0.139	0.255	0.255	0.163	0.222	0.222	0.026	0.258	0.054	0.054	0.251	0.251	0.000	0.001	0.001	0.000	0.000	0.000
12	0.000	0.004	0.004	0.000	0.007	0.007	0.000	0.000	0.000	0.001	0.000	0.000	0.000	0.000	0.000	0.001	0.000	0.000
13	0.007	0.000	0.000	0.019	0.000	0.000	0.004	0.002	0.002	0.012	0.001	0.001	0.003	0.000	0.000	0.013	0.000	0.000
14	0.009	0.022	0.022	0.046	0.027	0.027	0.002	0.149	0.011	0.011	0.117	0.117	0.000	0.201	0.000	0.000	0.005	0.005
15	0.023	0.005	0.005	0.029	0.003	0.003	0.003	0.006	0.012	0.012	0.007	0.007	0.004	0.023	0.018	0.018	0.013	0.013
16		0.053			0.058	0.058		0.092			0.140	0.140		0.001			0.004	
17		0.000			0.000	0.000		0.000			0.001	0.001		0.000			0.000	
18		0.003			0.003	0.003		0.001			0.001	0.001		0.000			0.000	
19		0.006			0.008	0.008		0.000			0.000	0.000		0.000			0.000	
20		0.003			0.004	0.004		0.005			0.005	0.005		0.018			0.024	

Table 2 presents the averages of the estimates of the values of social-capital dimensions by country group and gender. These are representative of the values used in the following regressions. Table 3 reports the estimated probabilities of women and men in each country group being assigned to each cluster.³ The results show that the probabilities are similar between men and women within a group of countries (with some notable exceptions, such as activity levels between men and women in low-income countries) but differ across country groups. Figure 3 illustrates the joint distribution of the predicted values of the dimensions of social capital by gender (across all countries; disaggregation by country group is available on request), a pair of dimensions at a time. The results reveal that trust and social network are associated positively with each other in both gender groups, while the level of social activity is associated negatively with the other two dimensions of social capital. The distributions vary across country-groups, pointing to institutional, cultural, religious differences, but the differences between genders are minor – as we found in Table 3. This suggests that women and men in the MENA region have similar predispositions and opportunities for social engagement. This consistency in distributions allows us to assess the impact of social capital on women's and men's employment outcomes using the same framework and suggests that gender gaps in employment may not be due to differential patterns in social engagement. The differences across countries suggest that country income-group fixed effects should be used in regressions.

Instrumenting for social-capital clusters

Social capital may be endogenous to workers' employment outcomes, because workers in different occupations have different access to networking, capacity to socialise, and possibly even trust in their peers and surrounding institutions. This endogeneity can be addressed by isolating the part of social capital that is independent of employment outcomes – an instrumental variable approach. As an instrument for the potentially endogenous stock of social capital in employment regressions, a 'doughnut' IV is employed. This essentially distils the exogenous part of an individual's potentially endogenous social capital that is explained by

³ Figures A1–A7 illustrate these results by gender and country income group. In Figure A1, a monotonic pattern is found in the level of social activity while other dimensions of social capital exhibit a U-shaped pattern for both men and women. Figure A2 also illustrates the results by country income group, showing interesting patterns in gender inequality for social capital: men generally report higher levels than women except for the quality of social networks in middle-income countries, and trust in middle-income and low-income economies. Such dissimilar patterns in the values of social capital dimensions imply that the three dimensions of social capital may not be very similar in nature, and in fact function quite differently depending on workers' gender and country of residence, or possibly other covariates.

social capital norms prevalent in the individual's larger community rather than the individual's own character or performance. The intuition behind a doughnut IV in this setting lies in the conceptual nature of social capital, that is, that a person's accumulation of social capital is influenced by their interaction with their community, and by the stock of social capital prevalent in the community. At the same time, the level of social capital prevalent among one's neighbours does not bias the employment effect of one's own social capital in the structural model (evaluated informally by adding the instruments to the structural equations along with non-instrumented social capital). Individuals' error terms are thus independent of the doughnut IV, but the IV has a significant partial effect on one's social capital (evaluated through simple correlations, and through the first stage regressions). Our IVs thus satisfy the second-stage exclusion and the first-stage significance conditions for valid IVs [Warner 2001; Flora 2004; Kawachi 2006; Ling and Dale 2013].

The community-level doughnut IV is defined exogenously for demographic cells at the level of countries, narrow age cohorts, the sizes of the towns of residence, and survey waves. For individuals in each demographic cell (excluding the individual in question), the averages of estimates for the three social-capital dimensions are obtained, and they are used as the doughnut IVs for the social-capital dimensions of the individual in question.

Probabilistic regressions of employment status

Using the instrumented values of individuals' social capital, we next run probabilistic regressions for model A (*employed vs non-employed_{it}*) and model B (*full-time wage vs part-time wage/self-employed_{it}*) to investigate the effect of a person's social capital on his/her propensity to hold employment or have full-time wage work. For women, the marginal probabilities of being employed and (once employed) of having a full-time position increase with the values of all dimensions of social capital. The probability of women accepting employment rises by 98% as their level of social activity increases by one category and rises by 109% as their trust level increases. Interestingly, men's results exhibit quite different patterns: the level of social activity has a negative effect on men's prospect of being employed, while their trust level affects it positively. The quality of one's network has surprisingly little effect on the employment outcomes of either gender.

In model B, we find generally adverse effects for most dimensions of social capital on workers' full-time status. In particular, women's probability of attaining a full-time job falls at higher levels of social activity and trust. Similarly, men's probability of holding a full-time job falls by two-thirds with an increase in their social activity, while it increases by 45% with an increase in their trust level. The quality of one's social networks turns out to be significant only among men: men's chances of obtaining a full-time job increase with the quality of their social

Table 4. Marginal probabilities for models A and B

Marginal probabilities	Model A (employed vs non-employed)					
	Women (6329 observations)			Men (6760 observations)		
	Social activity	Network	Trust	Social activity	Network	Trust
	0.9796 (0.000)	0.0139 (0.904)	1.0899 (0.000)	-0.1277 (0.032)	-0.0326 (0.394)	0.2074 (0.000)
Marginal probabilities	Model B (full-time wage vs part-time wage / self-employed)					
	Women (2346 observations)			Men (6146 observations)		
	Social activity	Network	Trust	Social activity	Network	Trust
	-0.7691 (0.001)	-0.2125 (0.377)	1.2825 (0.000)	-0.6866 (0.000)	0.1692 (0.020)	0.445 (0.000)

Notes: Authors' analysis based on World Values Survey, waves 4–6; p-values in parentheses.

network, while for women it does not matter. The key numerical results of models A and B are summarised in Table 4. The units of social-capital indicators can be used to interpret the marginal probabilities. For example, a one-unit increase in social activity implies that a person is becoming more active (going from being a non-member to being an inactive member, or from being inactive to being active) in various social organisations or spending more time with friends or family (from practically never to a few times a year, or from a few times a year to weekly). Similarly, a one-unit increase in network implies getting information from friends or colleagues more often or recognising oneself as part of a community in a stronger sense. A one-unit increase in trust implies gaining more trust or confidence in one's family or neighbourhood, in the government or institutions in society, or even in the justice system/courts or in people of other religions.

Multinomial ordered-probability regressions: models C, D and E

Next we estimate the ordered-probability regressions for models C (degree of autonomy on a job), D (intellectual nature of a job), and E (routine to creative job) in order to investigate the effects of social capital on one's prospect of holding a certain quality of job. These models are estimated on restricted samples of full-time wage workers, and hence cover substantially fewer women, who are typically economically inactive or are second earners in their family [Singell and Lillydahl 1986; Winkler and Rose 2001; Morrisson and Jutting 2005; Kaygusuz 2010]. Specifically, these models cover 2285–2297 men, but only 893–896 women.

Table 5 presents the central results of these regressions, namely the marginal effects of the three dimensions of social capital (instrumented) on the probability of each employment outcome across the 1–10 spectrum of the dependent variables.⁴ Table 5 and Figure 4 confirm that the marginal effects at the extreme values of 1 and 10 are estimated somewhat off the trends (or with less precision) seen between values 2 and 9.

The first block in Table 5 shows that the degree of autonomy that women enjoy in their jobs is associated negatively with their level of trust (borderline significant at the 10% level). Similarly, among men the degree of autonomy is associated negatively with their trust level, but there is a strong positive association with their level of social activity and networks. Some interpretations are that: (1) jobs with greater autonomy require staffing by workers who are inherently

⁴ To fix our focus in Table 5, selected marginal effects – those on the values of 3 and 7 of the dependent variables – are highlighted as of particular interest, interpreted as the effects on relatively low and relatively high degrees of job autonomy (intellectuality or creativity, respectively), with adequate sample sizes each. By contrast, values 1–2 and 8–10 are for smaller groups of (outlying) workers and their marginal effects are estimated on smaller sample sizes.

active and who possess resources such as networks, but who have critical world-views and vantage points, including independent reasoning and a scepticism towards externally provided stimuli; and/or that (2) workers demonstrate their preferences in regard to relying on external factors by choosing appropriate jobs. Workers are thus matched to jobs based on their soft skills.

The second, middle block in Table 5 shows that, among both gender groups, the degree of cognitive load in one's job has a weakly negative association with one's level of social networks (near significant at the 10% level among women). Among men, it is also associated strongly positively with social activity, and strongly negatively with one's personal trust. As with job autonomy, the likely culprits have to do with employers' demands over workers' skill sets across different job types, and with workers' own self-selection into careers and jobs. Jobs and careers with a heavy cognitive load may attract – from the demand or supply side – workers with high levels of social activity but, perhaps incidentally, also workers with limited active social networks and low trust in social institutions – such as people with advanced independent reasoning and conservative views of external forces.

Finally, the bottom block in Table 5 shows that, among both men and women, the degree of creativity in a job is associated strongly positively with the activity level of incumbent workers' social engagement, but negatively with workers' social networks (and weakly negatively also with their level of trust in social institutions). In creative jobs, then, workers appear to be selected from among those with more outgoing socialising levels but narrower social networks.

Taken together, the results in Table 5 confirm that the three dimensions of social capital have heterogeneous effects on workers' employment status, the effects vary by gender, and the effects evolve near monotonically across the spectra of employment types. The marginal effects have, for the most part, the same signs between women and men (except in model D) but vary in magnitude and significance. While the effects on women's employment type are typically not significant statistically (partly on account of the smaller sample of women), and at most one social-capital dimension is significant in women's regressions, the effects of 2–3 social-capital dimensions are highly significant in men's regressions. For completeness, the models presented in Tables 4 and 5 are highly significant, as evidenced by their R-squared and Wald chi-square statistics.⁵

⁵ The validity of the ordered probability models relies on the proportional odds (PO) assumption that the modeled effects are consistent across all outcomes. This property is confirmed to be reasonable conceptually, but an empirical Brant [1999] test puts the assumption in question. While some variables satisfying the PO assumption, the chi-square statistics for the set of all explanatory variables in models C, D and E reject the null hypothesis of validity, indicating that at least one variable violates the PO assumption for at least one outcome. This is not surprising given that the Brant test is not powerful

Discussion

The results of our analysis paint a varied picture of the role of social capital in explaining workers' employment outcomes and types of jobs. We found that workers' trust in social institutions, the way it was defined here, is conducive to workers' more active roles in the labour market in terms of the prospect of employment and full-time work but appears to be a detractor (or a predictor of non-selection) from autonomous, intellectual, and creative positions. The level of workers' social networks is not a significant predictor of their labour-market activity, and only appears to matter (positively) for men's selection to autonomous posts and to non-creative/routine posts. Surprisingly, a higher level of social activity is broadly associated negatively with employment and full-time work, but positively with the prospect of selection to autonomous, intellectual, and creative jobs.

It is worth repeating that the role of the dimensions of social capital differs by gender in relation to how intellectual a job is, but not in relation to how autonomous and creative it is. (The top and bottom blocks in Table 5 show the marginal effects of the same sign between women and men, but not in the middle block. Figure 4 shows this visually between columns 1 and 3, but not 2.) One can infer that men and women face different selection processes (self-selection and/or employer selection) for jobs at the high and low ends of the spectrum of how intellectual a job is. While the level of social activity and trust have a bearing on the prospect of men being matched to jobs, for women it is only their social network that correlates with job selection. An example could be that *wasta* networks play a disproportionately high role in women's selection to less intellectual jobs (no effect among men in relation to the intellectual load of jobs), while the levels of social activity and trust help predict men's selection/non-selection to jobs at the high and low ends of the intellectual-load spectrum of job types.

and is 'anticonservative' [Peterson and Harrell 1990; O'Connell 2006]. The test nearly always yields small p-values, particularly when the number of explanatory variables is large [Brant 1990], the sample size is large [Clogg and Shihadeh 1994], or the covariates include continuous variables [Allison 1999]. In case of rejection of the null hypothesis, the *generalised ordinal regression model*, allowing dissimilar effects by outcome, may provide a more consistent and closer fit to the data in question [Grace-Martin 2020], but it has the disadvantage that it is more parameterised, possibly less efficient, and more cumbersome to interpret when we are interested in general trends across all outcome values. An alternative solution would be a series of binary probit/logistic regressions if the interest is in marginal effects at a specific outcome value. In this context, we interpret the Brant test results as prescribing that the estimated effects be interpreted as the *general trend* in the true effects across outcomes of the response variables, rather than as the specific marginal effects at any outcome value. For completeness, the ordered probability models were also estimated with fewer outcome categories – 3 or 5 instead of 10 – but the results of the Brant tests remain unchanged. This helps to validate the robustness of our main models.

Table 5. Marginal probabilities for models C, D and E – first part

Level of job characteristic	Model C (degree of autonomy, 1 to 10)					
	Women (893 observations)			Men (2285 observations)		
	Social activity	Network	Trust	Social activity	Network	Trust
1	-.063 (.677)	-.312 (.521)	.158 (.103)	-.213 (.022)	-.172 (.000)	.093 (.150)
2	-.017 (.676)	-.082 (.524)	.042 (.109)	-.074 (.025)	-.060 (.001)	.032 (.155)
3	-.017 (.676)	-.082 (.523)	.042 (.113)	-.081 (.024)	-.066 (.001)	.035 (.153)
4	-.020 (.676)	-.101 (.525)	.051 (.115)	-.063 (.023)	-.051 (.001)	.027 (.154)
5	-.018 (.675)	-.090 (.527)	.045 (.114)	-.079 (.023)	-.064 (.001)	.034 (.154)
6	-.003 (.680)	-.015 (.554)	.008 (.219)	-.011 (.054)	-.009 (.021)	.005 (.194)
7	.006 (.678)	.029 (.521)	-.015 (.119)	.027 (.031)	.022 (.001)	-.012 (.158)
8	.017 (.676)	.083 (.522)	-.042 (.107)	.076 (.024)	.062 (.000)	-.033 (.152)
9	.017 (.677)	.085 (.522)	-.043 (.110)	.085 (.024)	.068 (.000)	-.037 (.154)
10	.098 (.676)	.484 (.523)	-.244 (.106)	.332 (.021)	.269 (.000)	-.145 (.151)

Table 5. Marginal probabilities for models C, D and E – second part

	Model D (manual to intellectual, 1 to 10)					
	Women (896 observations)			Men (2297 observations)		
	Social activity	Network	Trust	Social activity	Network	Trust
1	.023 (.895)	.837 (.157)	.003 (.982)	-.614 (.000)	.058 (.472)	.251 (.002)
2	.005 (.895)	.159 (.161)	.001 (.982)	-.107 (.000)	.010 (.470)	.044 (.021)
3	.005 (.895)	.178 (.159)	.001 (.982)	-.074 (.000)	.007 (.470)	.030 (.022)
4	.003 (.895)	.112 (.160)	.000 (.982)	-.034 (.000)	.003 (.470)	.014 (.026)
5	.004 (.895)	.127 (.156)	.000 (.982)	-.016 (.029)	.002 (.048)	.007 (.105)
6	.000 (.913)	.002 (.833)	.000 (.982)	.039 (.000)	-.004 (.477)	-.016 (.020)
7	-.002 (.895)	-.056 (.195)	-.000 (.982)	.083 (.000)	-.008 (.474)	-.034 (.019)
8	-.005 (.895)	-.164 (.168)	-.001 (.982)	.144 (.000)	-.014 (.473)	-.059 (.019)
9	-.004 (.895)	-.137 (.168)	-.000 (.982)	.148 (.000)	-.014 (.472)	-.061 (.021)
10	-.030 (.895)	-1.054 (.150)	-.003 (.982)	.431 (.000)	-.041 (.469)	-.176 (.020)

Table 5. Marginal probabilities for models C, D and E – third part

	Model E (routine to creative, 1 to 10)					
	Women (896 observations)			Men (2295 observations)		
	Social activity	Network	Trust	Social activity	Network	Trust
1	-.857 (.004)	1.816 (.008)	.237 (.177)	-.665 (.000)	.357 (.000)	.086 (.460)
2	-.091 (.006)	.193 (.009)	.025 (.183)	-.111 (.000)	.060 (.000)	.014 (.462)
3	-.056 (.007)	.118 (.094)	.015 (.192)	-.069 (.000)	.037 (.000)	.009 (.463)
4	-.009 (.217)	.019 (.277)	.003 (.359)	-.018 (.004)	.010 (.004)	.002 (.474)
5	.062 (.017)	-.131 (.114)	-.017 (.190)	.047 (.001)	-.025 (.002)	-.006 (.460)
6	.087 (.009)	-.185 (.096)	-.024 (.179)	.073 (.000)	-.039 (.000)	-.010 (.460)
7	.172 (.006)	-.365 (.009)	-.048 (.180)	.128 (.000)	-.068 (.000)	-.017 (.460)
8	.184 (.006)	-.390 (.009)	-.051 (.182)	.165 (.000)	-.088 (.000)	-.021 (.461)
9	.138 (.007)	-.217 (.100)	-.038 (.178)	.149 (.000)	-.080 (.000)	-.019 (.461)
10	.370 (.004)	-.784 (.079)	-.102 (.186)	.303 (.000)	-.162 (.000)	-.039 (.462)

Notes: Authors' analysis based on the World Values Survey, waves 4–6. Values shown are the marginal effects of a one-cluster increase in the dimension of social capital. P-values are in parentheses, the marginal effects on values 3 and 7 are in italics, for ease of reference to the values of interest (representing moderately low and moderately high degrees of autonomy/cognitive load/creativity).

Figure 3. Summary of marginal effects on employment types by social-capital dimension – first part

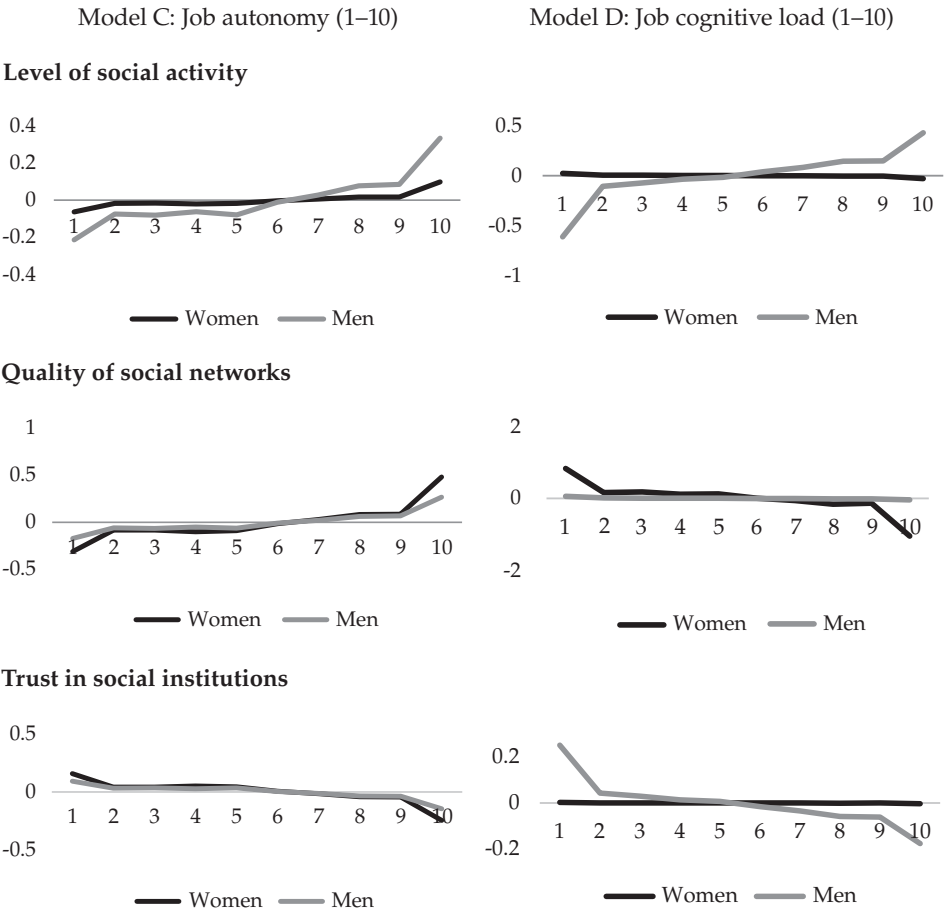
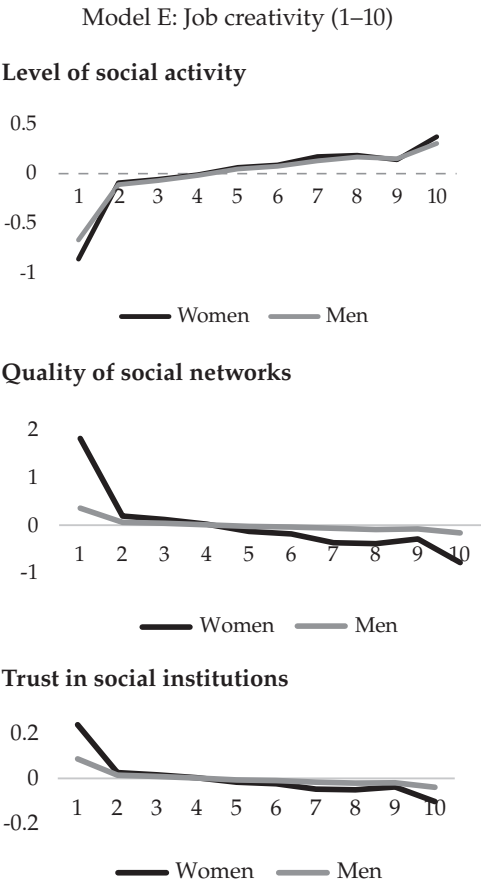


Figure 3. Summary of marginal effects on employment types by social-capital dimension – second part



Notes: Authors' analysis based on the World Values Survey, waves 4–6. The values shown are the marginal effects of a one-cluster increase in the dimension of social capital on the probability of a specific job type.

Social capital acquisition and employment-type prospects

One implication of the varied effects of the dimensions of social capital is that observing workers' social-capital profiles would go some way to predicting their employment status and job type – at present or in the future. Taking this line of thought one step further, and interpreting the findings causally, we could attempt to provide advice on what other skills complementary to the existing profiles of social capital should be invested in by job candidates that would endow them with a similar skill set to that of current incumbents in a given job type. Table 6 summarises the empirically observed associations between the dimensions of social capital and workers' employment status: '+' ('0' or '-') indicates that the dimension of social capital is associated positively (or not clearly or negatively, respectively) with a particular employment type.

Policy implications

The analysis and findings in this study contribute to filling important voids in existing scholarship and policy discourse on the role of workers' social capital in MENA countries' labour markets – and by extension the labour markets in developing countries worldwide. By surveying the region's literature on social capital, we also aimed to increase global awareness of the economic reality in the region's labour markets. Given what we know and what we have confirmed, policymakers across the region would be advised to harness the value of their citizens' social capital for achieving certain common goals, such as efficient matching of workers and jobs, better fluidity in labour relations, efficient labour mobility across various sectors of the countries' labour markets, and enhanced social trust and solidarity.

Our findings suggest that workers' incentives for human/social capital acquisition are linked to their career expectations. Failures to harness workers' social capital affect workers' personal outcomes and act as a burden on the region's economic and social potential. The MENA region's notoriously precarious labour market conditions and the fractionalisation of the civic sphere – and, by extension, civic discontent – go hand in hand with the failures to account for workers' social aptitudes and needs. The plight of mismatched, underutilised, and disenfranchised workers calls for urgent action to empower them to make use of all their endowments, in order to enable them to transition to decent jobs and fitting civic roles. The gaps are all the more salient given that the MENA countries' aspirations under the Fourth Industrial Revolution depend crucially on the formation of human capital, networks, sharing, and trust. We hope that our findings will contribute to a policy discourse on the appropriate facilitation of social engagement, networks, and trust among the region's workforce towards the fulfilment of the countries' development strategies.

Table 6. Social capital and employment-type associations

Model	Employment type	Social activity		Social network		Trust in social institutions	
		Women	Men	Women	Men	Women	Men
A	Employed	+	-	0	0	+	+
B	Full-time	-	-	0	+	+	+
C	Non-autonomous	0	-	0	-	+	+
	Autonomous	0	+	0	+	-	-
D	Manual	0	-	0	0	0	+
	Intellectual	0	+	0	0	0	-
E	Routine	-	-	+	+	+	0
	Creative	+	+	-	-	-	0

Notes: Authors' analysis based on the World Values Survey, waves 4–6. The values are a function of the individual and joint significance of the corresponding marginal effects. In models C–E, marginal effects at values 3 and 7 are considered; +/0/-: the dimension of social capital is associated positively /not clearly /negatively with the corresponding employment type.

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Exploring the Factorial Structure and Criterion Validity of Institutional Trust in Slovakia*

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Abstract: The present study aims to examine the dimensionality and criterion validity of the institutional trust construct in Slovakia using a comprehensive list of thirty-three public institutions. A representative sample of 600 Slovaks first reported their level of trust in institutions and then reported on their social trust, propensity to trust, dispositional trust, and trust radius measures. A holdout cross-validation method was used to evaluate the dimensionality of the institutional trust construct. Exploratory factor analysis yielded a six-factor solution, and the confirmatory factor analysis showed a good overall fit for the five-factor solution that included the following dimensions: political institutions, foreign institutions, social services institutions, order institutions, and media institutions. All five dimensions showed weak-to-moderate relationships with interpersonal trust measures. The present study highlights that delving into the dimensionality of institutional trust may contribute to the understanding of the phenomenon within specific geographical, political, societal, and historical, characteristics of the countries.

Keywords: institutional trust, political trust, media trust, factor analysis

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Introduction

As an important part of social capital, institutional trust is considered an essential factor for the social, economic, and political progress of societies [Lee and Schachter 2019; Neblo et al. 2010]. In addition to being associated with the subjective well-being of citizens [Hudson 2006], trust in institutions fosters cooperation, solidarity, and problem-solving [Lee and Teo 2005], and supports organisational transactions, market participation, as well as organisational effectiveness and development [Bromiley and Cummings 1995; Bülbül 2013; Ratnasingham 2005]. The lack of institutional trust, on the other hand, contributes to public discontent, extreme political views, protests, and violent conflicts [Salgiriev et al. 2016; van Prooijen and Krouwel 2019].

Given the importance of institutional trust, it may be surprising that the literature on institutional trust still suffers from a lack of a generally accepted definition and conceptualisation. The vast majority of studies measure trust in multiple institutions, such as parliament, political parties, police, or media, at once. The list of included institutions, however, is often very limited and varies markedly across studies. Consequently, the literature lacks consistency in the dimensionality of the institutional trust construct [e.g. Mishler and Rose 2005; Newton and Norris 2000; Rothstein and Stolle 2008].

Reflecting on these conceptual issues, the primary goal of the present study is to explore the dimensionality of the institutional trust construct in Slovak society. To bring a deeper view, the present study measures trust in thirty-three public institutions across a variety of societal areas. By including a comprehensive list of institutions, we aim to examine the dimensionality of the institutional trust construct and explore the composition of individual dimensions. Apart from capturing the dimensionality of institutional trust, the present study also contributes to the trust theory by examining the relationships between the identified dimensions and interpersonal trust constructs, such as propensity to trust, dispositional trust, social trust, and radius of trust. By delving deeper into these associations, we aim to investigate the criterion validity of the identified dimensions of institutional trust.

The definition and dimensionality of the institutional trust construct

As an interdisciplinary construct, institutional trust has been understood differently across research areas. Some authors define it as people's expectations of how institutions and the social systems should treat citizens [Kramer 1999] or as an attitude towards institutions [Moy et al. 2009]. Others, in turn, refer to institutional trust mainly as political trust [Kim 2014; Medve-Bálint and Boda 2014]. There are also some studies that have conceptualised trust as confidence in different institutions [Bean 2003; Cook and Gronke 2001], as a part of other concepts such as a voluntary state of vulnerability [Hoffman 2002], or as a component of a

broader concept such as perceived legitimacy [Tankebe 2012]. These variations in definitions impact the understanding of trust and the way trust in institutions is measured, contributing to inconsistent or even contradictory findings.

Unidimensional approach

Given the inconsistency in the definition and measuring of institutional trust, it is not surprising that there is no consensus on the dimensionality of the institutional trust construct either [e.g. Cook and Gronke 2001; Thomas et al. 2015; Mishler and Rose 2005; Newton and Norris 2000; Rothstein and Stolle 2008]. In particular, some studies favour a unidimensional structure of institutional trust [e.g. Listhaug 1984; Mishler and Rose 1997; 2005; Newton and Zmerli 2011; Zmerli and Newton 2017]. This notion relies on the assumption that trust in a range of institutions is just an expression of a single underlying attitude, i.e. institutions are closely linked regardless of their object, because of shared predictors or other factors, such as general propensity to trust or extrapolation [Harteveld et al. 2013]. As a result, the authors use simple sum-score measurements of institutional trust without testing the assumption of unidimensionality [Thomas et al. 2015]. According to van der Meer and Ouattara [2019], the unidimensional approach is problematic because it may suggest that individuals do not substantially distinguish between institutions. Such an approach contradicts the fundamental understanding of institutional trust as a relational concept based on three distinctive aspects: person *A* trusts object *B* to perform *X*. In this sense, van der Meer and Ouattara [2019] argue that if the trust in specific institutions would be an expression of a single underlying attitude, the evaluation of trust would be reduced only to its subject (*A* trusts), while the object and performance would remain overlooked.

Multidimensional approach

In contrast to the unidimensional approach, some studies are theoretically based on the assumption of multidimensionality and use factor models to identify the dimensions of institutional trust. Using this approach, some studies propose that institutions can be divided according to their formal characteristics. For instance, Cook and Gronke [2001] showed that trust in national and local institutions form separate dimensions. Concurrently, Newton and Norris [2000] proposed a two-dimensional solution dividing institutions into public and private. In their typology, public institutions are associated with the core functions of the state and include parliament, the civil service, the legal system, the police, and the army. The second dimension consists of private and broadly understood non-profit institutions (also those funded or subsidised from a state budget) such as the education system, the church, major companies, trade unions, and the press.

Besides dividing institutions according to their formal characteristics, several authors propose distinctions based on their societal purpose. For instance, using exploratory factor analysis, Bean [2003] and Rothstein and Stolle [2008] found a three-factor solution for institutional trust that distinguishes partisan, order, and media institutions. Political institutions with elected offices, such as parliament, governments, political parties, and the civil service, represent partisan institutions. The order institutions, in turn, are impartial and function with less political bias, although they are financed from the central budget. This category includes institutions such as the army, legal institutions, and the police. Finally, the media institutions, including TV and the press, serve as a control institution over partisan institutions. Ultimately, there is evidence that even those institutions that seem to represent one dimension, like political institutions, may be further divided into separate distinct subdimensions, such as representative and implementing political institutions [Breustedt 2018].

Reasons for the inconsistent findings in studies using a multidimensional approach

To sum up, although the majority of studies corroborate the multidimensionality assumption, the findings do not provide a clear view of the number and composition of institutional trust dimensions. Besides that, the list of included institutions varies across studies markedly and therefore the results are not comparable.

Considering the nature of the institutional trust construct, we believe that the findings about the dimensionality across countries might not be consistent even if the list of institutions would be similar. The reason for this is that institutional trust emerges always in a specific social, economic and political context and the institutions themselves are viewed and assessed by members of a given society or community. Collective experiences – both past and present – and how people respond to them may influence how institutions or groups of institutions are perceived. Finally, local political conditions may also affect how institutions are grouped into larger units in the citizens' perception. Consequently, understanding of institutional trust in one country may not be the same as in other countries.

In other words, the assumption that institutional trust is cross-nationally equivalent may be conceptually incorrect [van der Meer and Ouattara 2019]. There are several important contextual factors affecting institutional trust, such as culture [Kaasa and Andriani 2022], different levels of corruption [Anderson and Tverdova 2003], and political regime [Schneider 2017], which differ markedly across countries. These aspects may affect not just the levels of trust in particular institutions, but also, potentially, the dimensionality of the institutional trust construct. In this sense, we understand institutional trust as a formative theoretical construct that helps to capture the complexity of the interrelated dimensions that compose the construct. We understand the dimensions as causal variables, not the effect variables of the institutional trust construct [see Saris and Gallhofer

2007]. Consequently, we believe that there exists no universal dimensionality of institutional trust, but rather the construct may take different forms depending on the context in which the study is conducted.

The present study, thus, aims to investigate the dimensionality of institutional trust in Slovakia. Although we expect that some dimensions identified in previous studies, like political, media, and order institutions [Bean 2003; Rothstein and Stolle 2008], will be present in our study as well, including a comprehensive list of public institutions may lead to the identification of dimensions that were not identified before. For these reasons, we formulated the following research question: What is the dimensionality of the institutional trust construct in the Slovak context?

Methods

Participants and procedure

A representative sample of 600 Slovaks (300 men, 300 women) aged 18 to 78 years ($M = 45.20$, $SD = 14.82$) were hired by a public research agency to participate in an online self-report survey hosted on Qualtrics. We used a non-probability quota sampling method to achieve a gender-balanced adult population from every region of Slovakia. The education and marital status distributions are shown in Table 1. A computer-assisted web interview method was used to collect the data. Before signing an informed consent form, the participants were provided with general information about the aim of the study and their rights to remain anonymous and to withdraw from the participation at any time. As a part of larger data collection, participants first answered socio-demographic questions and completed interpersonal trust scales. They then reported how much they trust each of the thirty-three specific public institutions. The institutions were administered in a fixed order, but the order involved randomisation so that conceptually similar institutions (e.g. political institutions) were not administered close to each other. The survey included three attention check items. Individuals who failed to select the correct answers were excluded. In order to perform both exploratory and confirmatory factor analyses, the sample of 600 participants was randomly split into two separate data sets, which are available at the Open Science Framework repository (https://osf.io/zvtsyk/?view_only=e8e9af11e6d2466e93d9cc5ccf073d25).

Measures

Institutional trust

To measure institutional trust, we adapted a method that is widely used in cross-national surveys (e.g. ESS Round 9, European Social Survey 2018). Specifically,

Table 1. Study sample – education and marital status distribution

Distribution	Education					
	Primary	Secondary without the school-leaving exam	Secondary with the school-leaving exam	Bachelor's degree	Master's degree	Doctoral degree
Frequency	23	132	247	28	157	13
Percent	3.8	22	41.2	7.7	26.2	2.3

Distribution	Residential area				
	Farm or countryside house	Village	Small town	Suburb or periphery of a large city	Large city
Frequency	174	33	178	214	1
Percent	29	5.5	29.7	35.7	.2

Distribution	Marital status			
	Single	Married	Divorced	Widowed
Frequency	209	307	66	18
Percent	34.8	51.2	11	3

we asked participants to indicate how much they trusted each of the thirty-three following institutions: political parties, Office of the President of the Slovak Republic, National Council of the Slovak Republic, Government of the Slovak Republic, police, courts, army, prosecutor's office, European Parliament, European Commission, European Council, Court of Justice of the European Union, World Bank, United Nations, North Atlantic Treaty Organisation (NATO), International Criminal Police Organisation (Interpol), International Monetary Fund (IMF), World Health Organisation (WHO), commercial banks, insurance companies, educational institutions, research institutions, health institutions, religious institutions, fire services, environmental institutions, social services institutions (e.g. services for older adults, day centres, care services), television media, internet media, print newspapers and magazines, internet social media, non-governmental institutions, and trade unions. Participants answered on a five-point scale (1 = distrust completely, 5 = trust completely).

Interpersonal trust

Several interpersonal trust measures were administered to assess the criterion validity of the dimensions of institutional trust recognised in factor analysis. Based on numerous previous studies on the relationship between generalised interpersonal trust constructs and institutional trust [for a review of these studies see Newton and Zmerli 2011; Suh et al. 2012; Allum et al. 2010], we hypothesise that the identified institutional trust dimensions show positive weak-to-moderate relationships with these interpersonal trust measures.

Trust propensity. A four-item Propensity to Trust Scale [Frazier et al. 2013] was used to measure trust propensity. It is a unidimensional scale that captures the general willingness to trust others, regardless of social and relationship-specific information. The items are constructed to ask individuals to assess their own stable general tendencies to trust (e.g. *My tendency to trust others is high*). The participants answered on a five-point Likert scale (1 = strongly disagree, 5 = strongly agree).

Dispositional trust. Two subscales of the Disposition to Trust Scale [McKnight et al. 2002] were used to measure dispositional trust. The benevolence subscale measures individuals' beliefs about whether people generally care and act in others' interests (e.g. *The typical person is sincerely concerned about the problems of others*). The integrity subscale measures individuals' beliefs about whether people generally keep their commitments and do not lie (e.g. *Most people are honest in their dealings with others*). Importantly, compared to the Propensity to Trust Scale [Frazier et al. 2013], items in this scale are constructed in a way that they ask about individuals' beliefs about others' trustworthiness. Both subscales consist of three items and were answered on a five-point Likert scale (1 = strongly disagree, 5 = strongly agree).

Social trust. Three questions from the European Social Survey [European Social Survey 2016] were used to measure social trust. The questions ask about

individuals' beliefs about whether other people can be trusted or whether they are benevolent and helpful (e.g. *Generally speaking, would you say that most people can be trusted, or that you can't be too careful in dealing with people?*) were answered on an 11-point scale (e.g. 0 = you can't be too careful, 10 = most people can be trusted).

Trust radius. The radius of social trust was measured using a method proposed by Lim et al. [2021]. The method is based on seven questions asking how much individuals trust the following groups: family, friends, relatives, neighbours, people in the same region, foreigners/immigrant workers, and strangers. These questions were answered on a five-point scale (1 = distrust completely, 5 = trust completely). Trust radius is represented as a slope of the change in the trust level from in-groups (family) to out-groups (strangers), with a flatter slope indicating a wider radius and a steeper, negative slope a narrower radius. These slopes were estimated using multilevel regression of trust level in each group on the distance between the respondent and each group (see Lim et al. [2021] for further information).

Statistical analyses

The descriptive statistics and Pearson's correlations were assessed to see the average levels and associations between the observed variables. Then, a holdout cross-validation method was used for evaluating the dimensionality of the institutional trust construct [see Knafl and Grey 2007]. In particular, the data set consisting of 600 responses was randomly split into two disjoint subsets of 300 participants.

The first subset was used for exploratory factor analysis (EFA) to obtain an appropriate factor model for the institutional trust construct. A Mahalanobis' distance measure was conducted to test for the multivariate normality, which was used to determine an extraction method [see Fabrigar et al. 1999]. A Kaiser's eigenvalue criterion, Scree plot, parallel analysis [Horn 1965], and Velicer's minimum average partial criteria test (MAP) were used to determine the number of components that should be kept. Since we assumed that the identified institutional trust components might correlate, a direct oblimin rotation method was used in EFA. EFA was performed using JAMOVİ 1.6.23 software [The Jamovi Project 2021].

The second subset was used for confirmatory factor analysis (CFA) purposes to cross-validate the result obtained from EFA. We performed both first-order and second-order CFA using IBM AMOS 21 software. Following Hooper et al.'s [2008] recommendations, we evaluated the overall fit of the models using a Chi-square test, root mean square approximation error (RMSEA), a standardised root mean square residual (SRMR), a comparative fit index (CFI), a normed-fit index (NFI), and a Tucker-Lewis index (TLI).

Results

Descriptive statistics

The descriptive statistics along with the correlation heatmap for the levels of trust in 33 public institutions are reported in Table 2. The highest level of trust was reported for the fire services institutions ($M = 4.11$; $SD = .87$). Except for fire services, there were only five more institutions (educational, research, health, environmental, and social services institutions) that were perceived as trustworthy (i.e. had an average score above the scale midpoint). The other institutions had average scores below the scale midpoint, which means that, on average, individuals perceived them as rather untrustworthy. Regarding correlations, a curious pattern was found for the Office of the President of the Slovak Republic which showed stronger correlations with foreign institutions than with national institutions. The correlational heatmap also indicates that foreign institutions strongly correlated with each other. Moreover, non-governmental institutions also showed strong correlations with foreign institutions. This pattern may suggest that along with the Office of the President of the Slovak Republic, foreign and non-governmental institutions could represent a joint component. Finally, we found strong correlations between media institutions, but also between national political institutions, suggesting that these two types of institutions may also represent latent constructs.

The dimensionality of the institutional trust construct

Exploratory factor analysis

To explore the dimensionality of the institutional trust construct, all 33 institutions were entered into a principal axis factoring exploratory factor analysis (PFA-EFA) with oblique direct oblimin rotation. The principal axis factoring extraction method was selected due to the deviation from the multiple normality indicated by Mahalanobis' distance test. Bartlett's test of sphericity ($\chi^2 (528) = 8902.15$; $p < .001$) and the Kaiser-Meyer-Olkin measure of sampling adequacy ($KMO = .94$) indicated that our data were suited for factor analysis. To determine the number of components, Kaiser's criterion of eigenvalues greater than 1 suggested a six-factor solution as the best fit for the data. The examination of the scree plot, however, showed an inflection point located at the fifth factor, suggesting a four-factor solution. The Parallel analysis showed that six of the calculated eigenvalues were greater than the randomly generated eigenvalues. Finally, a Velicer's minimum average partial criteria (MAP) test suggested a six-factor solution. Therefore, we have decided to conduct a final analysis for a six-factor solution. Table 3 shows the factor loadings for the six-factor solution after rotation. As recommended by Stevens [2002] a cut-off point with an absolute value greater than .4 was used to interpret the factor loadings. No items' cross-loadings were detected. Following

Table 2. Descriptive statistics and correlation heatmap for institutional trust

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11
1 Political parties	1.72	.86	—										
2 President SR	2.59	1.32	.38	—									
3 National Council	1.90	.94	.64	.55	—								
4 Government	1.79	.98	.61	.47	.77	—							
5 Police	2.72	1.02	.29	.39	.44	.39	—						
6 Courts	2.40	1.03	.28	.35	.41	.34	.69	—					
7 Army	2.98	1.05	.27	.45	.42	.40	.61	.54	—				
8 Prosecutor offices	2.44	1.02	.33	.40	.45	.41	.66	.78	.61	—			
9 European Parliament	2.44	1.14	.37	.67	.50	.47	.41	.48	.47	.52	—		
10 European Commission	2.43	1.15	.38	.68	.52	.48	.40	.47	.48	.52	.96	—	
11 European Council	2.44	1.14	.38	.68	.50	.47	.40	.46	.48	.52	.95	.98	—
12 Court of Justice of the EU	2.70	1.16	.31	.66	.45	.41	.41	.45	.50	.48	.81	.82	.83
13 The World Bank	2.53	1.04	.39	.58	.51	.47	.38	.41	.48	.46	.72	.73	.74
14 United Nations	2.65	1.08	.36	.63	.48	.44	.41	.44	.49	.50	.72	.75	.75
15 NATO	2.45	1.15	.38	.65	.48	.48	.42	.45	.49	.49	.72	.74	.74
16 Interpol	2.98	1.04	.32	.52	.40	.38	.52	.46	.57	.51	.55	.56	.56
17 IMF	2.65	1.03	.39	.57	.47	.44	.43	.44	.50	.48	.65	.67	.68
18 WHO	2.89	1.17	.34	.60	.43	.44	.41	.42	.45	.45	.68	.68	.68
19 Commercial banks	2.58	.98	.29	.42	.36	.32	.36	.39	.41	.47	.51	.51	.53
20 Insurance companies	2.54	1.01	.28	.31	.35	.30	.29	.39	.35	.43	.41	.42	.41
21 Educational institutions	3.19	.94	.23	.31	.34	.29	.40	.41	.48	.47	.37	.38	.38
22 Research institutions	3.61	.97	.20	.47	.28	.25	.39	.36	.49	.43	.49	.49	.49
23 Health institutions	3.39	.98	.29	.44	.36	.32	.40	.41	.50	.48	.47	.48	.49
24 Religious institutions	2.43	1.18	.28	.12	.30	.31	.25	.20	.27	.26	.15	.14	.14
25 Fire services	4.11	.87	<.01	.14	.11	.10	.26	.21	.34	.23	.14	.14	.14
26 Environmental institutions	3.15	.98	.24	.46	.33	.32	.29	.31	.41	.33	.49	.49	.49
27 Social services	3.19	.94	.23	.31	.32	.29	.35	.34	.37	.36	.33	.34	.35
28 Television media	2.22	1.01	.38	.53	.45	.43	.31	.34	.37	.37	.49	.51	.50
29 Internet media	2.32	.94	.34	.34	.36	.32	.21	.22	.27	.25	.32	.34	.34
30 Print newspapers and magazines	2.40	.94	.31	.45	.38	.37	.26	.27	.31	.32	.44	.44	.44
31 Internet social media	2.13	.91	.30	.24	.34	.28	.22	.23	.26	.24	.27	.29	.30
32 Non-governmental institutions	2.41	.99	.33	.56	.43	.40	.26	.30	.34	.33	.58	.58	.59
33 Trade unions	2.80	.90	.23	.19	.28	.17	.30	.33	.32	.36	.32	.31	.31

Note: Values above .13 are statistically significant at the level $p < .001$, values between .11 and .12 are statistically

12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32
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—																				
.70	—																			
.74	.75	—																		
.69	.71	.79	—																	
.62	.57	.66	.63	—																
.63	.79	.74	.70	.67	—															
.63	.64	.68	.67	.59	.68	—														
.46	.60	.55	.50	.48	.58	.51	—													
.36	.44	.39	.39	.36	.39	.39	.68	—												
.36	.39	.46	.38	.47	.44	.45	.53	.52	—											
.52	.47	.54	.48	.56	.50	.59	.46	.40	.61	—										
.48	.46	.52	.50	.56	.49	.6	.48	.42	.61	.75	—									
.13	.19	.22	.18	.24	.23	.22	.23	.29	.39	.23	.28	—								
.20	.14	.20	.16	.33	.19	.25	.19	.18	.33	.49	.44	.09	—							
.45	.45	.50	.47	.43	.47	.56	.37	.31	.37	.52	.50	.19	.34	—						
.39	.38	.43	.39	.44	.39	.42	.40	.34	.52	.44	.52	.31	.34	.41	—					
.43	.52	.50	.48	.40	.49	.46	.46	.40	.40	.38	.42	.25	.10	.40	.37	—				
.31	.38	.38	.35	.30	.35	.28	.37	.34	.31	.26	.30	.21	.17	.27	.34	.71	—			
.37	.48	.45	.43	.35	.44	.41	.41	.37	.39	.37	.34	.21	.14	.37	.34	.74	.69	—		
.26	.34	.34	.31	.26	.30	.22	.30	.33	.26	.13	.22	.24	.10	.24	.32	.51	.69	.58	—	
.54	.54	.54	.57	.44	.53	.56	.42	.32	.32	.42	.40	.16	.12	.53	.33	.55	.47	.53	.42	—
.29	.30	.34	.27	.38	.32	.32	.23	.25	.35	.35	.38	.23	.24	.31	.42	.32	.31	.30	.30	.38

significant at the level $p < .01$, values between .01 and .10 are statistically significant at the level $p < .05$.

Table 3. Rotated factor loadings for the six-factor model of institutional trust construct – first part

Items	Foreign institutions	Media institutions	Social services institutions	Political institutions	Order institutions	Financial institutions	h ²
European Commission	.90	.06	-.07	.02	.07	.04	.92
European Parliament	.90	.07	-.05	-.01	.09	<.01	.89
European Council	.89	.09	-.06	<.01	.07	.04	.92
Court of Justice of the EU	.73	-.04	.12	.05	.16	-.07	.73
The World Bank	.61	.02	<.01	.11	.02	.28	.74
United Nations	.60	.02	.20	.10	.02	.14	.73
NATO	.58	.08	.13	.12	.09	.04	.68
WHO	.57	-.02	.37	.12	-.07	.07	.72
President SR	.54	.05	.17	.25	-.06	-.07	.57
IMF	.48	-.05	.18	.15	.07	.22	.68
Non-governmental institu- tions	.40	.33	.20	.18	-.15	-.04	.58
Internet media	.03	.88	.01	.01	-.06	<.01	.77
Internet social media	-.06	.81	-.11	.01	.09	-.02	.62
Print newspapers and magazines	.18	.67	.07	<.01	-.03	.08	.68
Television media	.18	.58	.08	.11	-.04	.13	.69
Trade unions	-.06	.34	.28	<.01	.27	-.02	.38
Research institutions	.13	.02	.73	-.03	<.01	.19	.77
Health institutions	-.01	.06	.66	.05	.06	.17	.65
Fire services	-.15	.05	.59	-.10	.17	-.09	.34

Table 3. Rotated factor loadings for the six-factor model of institutional trust construct – second part

Items	Foreign institutions	Media institutions	Social services institutions	Political institutions	Order institutions	Financial institutions	h ²
Environmental institutions	.30	.05	.53	.09	-.06	-.06	.51
Educational institutions	-.22	.20	.41	<.01	.25	.34	.59
Social services	-.10	.29	.40	.07	.18	-.01	.39
Interpol	.24	-.06	.38	.15	.26	.06	.61
Government	.03	-.05	-.01	.89	<.01	-.01	.76
National Council	-.01	.05	-.05	.85	.09	-.03	.78
Political parties	-.05	.08	-.08	.70	-.03	.12	.52
Religious institutions	-.23	.16	.16	.27	.16	.16	.27
Courts	.11	.02	-.04	-.01	.80	.07	.75
Prosecutor's offices	.12	.04	-.06	.07	.75	.13	.80
Police	.06	-.05	.11	.14	.71	-.09	.67
Army	.15	<.01	.31	.11	.46	-.08	.58
Commercial banks	.15	<.01	.08	.01	.02	.74	.75
Insurance companies	-.03	.12	-.01	.08	.08	.70	.66
Eigenvalues	14.68	1.79	1.50	1.08	.61	.48	–
% of variance	20.20	9.83	10.63	9.41	9.18	6.52	–
Ω	.95	.89	.83	.87	.89	.84	–

Note: The table shows the factor loadings and cross-loadings for the six identified factors. The factor loadings are shown in bold. The principal axis factoring extraction method with a cut-off point of .4 was used in combination with oblique direct oblimin rotation, ω – reliability coefficient of the McDonald's omega test.

rotation, six factors together accounted for 65.8% of the total variance. McDonald's reliability coefficients ranged from .83 to .95, indicating good to excellent reliability of six factors (see Table 3).

The first factor, accounting for 20.20% of the variance of institutional trust construct, combines mostly foreign institutions. The second factor can be called 'media institutions' since it combines all media institutions included in the present study. The factor accounted for 9.83% of the variance of the institutional trust construct. The third factor combines 'social services'. The factor accounted for 10.63% of the variance of the institutional trust construct. The fourth factor, accounting for 9.41% of the variance, can be called 'political institutions' or, as Rothstein and Stolle [2008] and Bean [2003] suggest, partisan institutions. Table 2 shows that this factor combines the three most untrustworthy institutions. The fifth factor includes institutions that are not political themselves but are strongly affected by politics. In line with Rothstein and Stolle [2008] and Bean [2003], this factor can be called non-partisan institutions or order institutions. The aim of these institutions is to preserve the law and social order, to detect and punish those who break the law and therefore should not be trusted. The factor accounted for 9.18% of the variance of the institutional trust construct. Finally, the sixth factor includes commercial financial institutions. Foreign financial institutions, like the World Bank or International Monetary Fund, did not represent this construct and were included in the foreign institutions instead. The sixth factor accounted for 6.52% of the variance of the institutional trust construct.

There were four items that proved to be problematic in the six-factor solution (trade unions, social services institutions, Interpol, and religion institutions). These institutions did not cross a cut-off point of .4, indicating that they did not meaningfully represent any of the six factors. These items were, therefore, removed from the following confirmatory factor analysis. Finally, all six factors were positively related with weak-to-moderate correlations (Table 4). Given these

Table 4. Correlations between the six dimensions of the institutional trust construct

Dimension	1	2	3	4	5	6
1 Foreign institutions						
2 Media institutions	.44***	–				
3 Social services institutions	.43***	.34***	–			
4 Political institutions	.62***	.49***	.35***	–		
5 Order institutions	.49***	.29***	.42***	.51***	–	
6 Financial institutions	.48***	.50***	.48***	.40***	.43***	–

Note: *** $p < .001$.

results, the six-factor solution was accepted as the adequate structural representation of the institutional trust construct and was further tested in the following confirmatory factor analysis.

Confirmatory factor analysis

As stated above, we aimed to cross-validate the model obtained by EFA on a second research sample consisting of 300 participants using a CFA. However, the 'financial institutions' factor identified by EFA contained only two items and therefore was locally under-identified. In order to have the whole model locally and globally identified, we decided to remove this factor and perform CFA with only five factors.

First-order CFA. In the first step, we performed a first-order CFA and allowed five factors to be correlated. The results of the CFA showed that the fit of the measurement model was not satisfactory ($\chi^2 = 3.93$; $df = 314$; $p < .001$; $SRMR = .09$; $CFI = .87$; $TLI = .86$; $NFI = .84$; $RMSEA = .099$; $RMSEA\ 90\% CI [.093, .105]$; $PCLOSE < .001$). There were a few reasons for such a poor model fit. First, there was a high covariance in the error terms between the 'internet media' and 'internet social media' items. This covariance seemed justifiable given that these items had very similar wording. Second, the error terms of all the European institutions (European Commission, European Council, European Parliament, and Court of Justice of the EU) showed a high covariance as well. As can be seen from a correlational heatmap (Table 2), these institutions showed very strong correlations, indicating that participants might not properly distinguish between these institutions. Finally, there was a high covariance in the error terms of the 'IMF' and the 'World Bank' as well as the 'United Nations' and 'NATO' institutions. These covariances seemed justifiable as well, given the fact that the IMF and the World Bank are the only two financial institutions and the United Nations and NATO are the only security and military organisations in the factor. Moreover, these pairs of institutions are closely linked in terms of their aims and missions. Since all these covariations seemed justifiable, we have decided to correlate the error terms between the mentioned institutions. The adjusted model showed an acceptable overall fit with the data ($\chi^2 = 2.15$; $df = 305$; $p < .001$; $SRMR = .06$; $CFI = .95$; $TLI = .95$; $NFI = .91$; $RMSEA = .062$; $RMSEA\ 90\% CI [.055, .068]$; $PCLOSE = .002$), confirming the existence and the structure of five factors identified by EFA. The final model is shown in Figure 1.

Second-order CFA. In the last step, we performed a second-order CFA on an adjusted five-factor model. The results of the second-order CFA showed that the fit of the measurement model was acceptable ($\chi^2 = 2.22$; $df = 310$; $p < .001$; $SRMR = .06$; $CFI = .95$; $TLI = .94$; $NFI = .91$; $RMSEA = .064$; $RMSEA\ 90\% CI [.058, .070]$; $PCLOSE < .001$). These findings confirm that the theorised institutional trust construct loads into five underlying dimensions of foreign, media, social, order, and political institutions (see Figure 2).

Figure 1. First-order confirmatory factorial analysis of the institutional trust construct

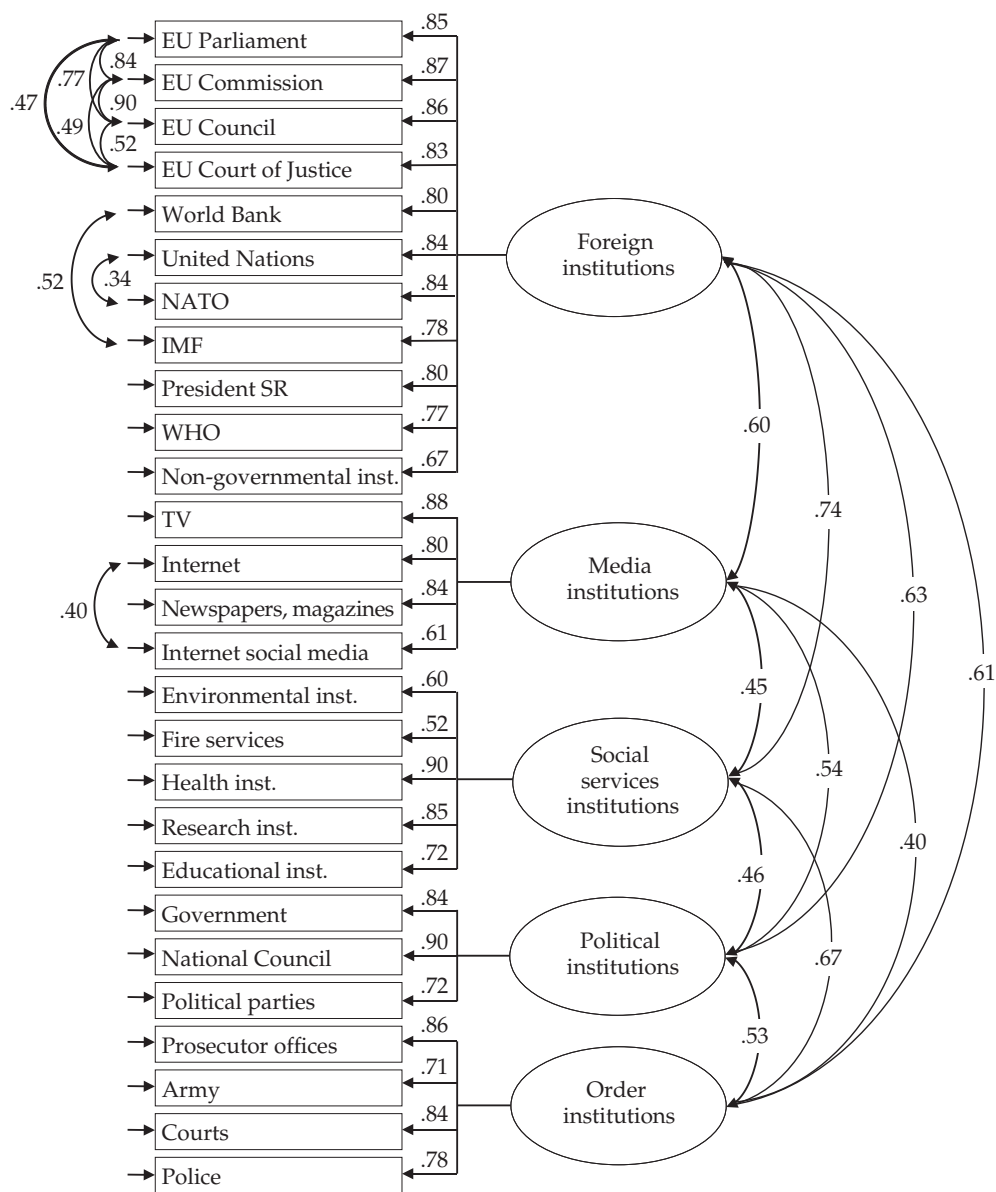


Figure 2. Second-order confirmatory factorial analysis of the institutional trust construct

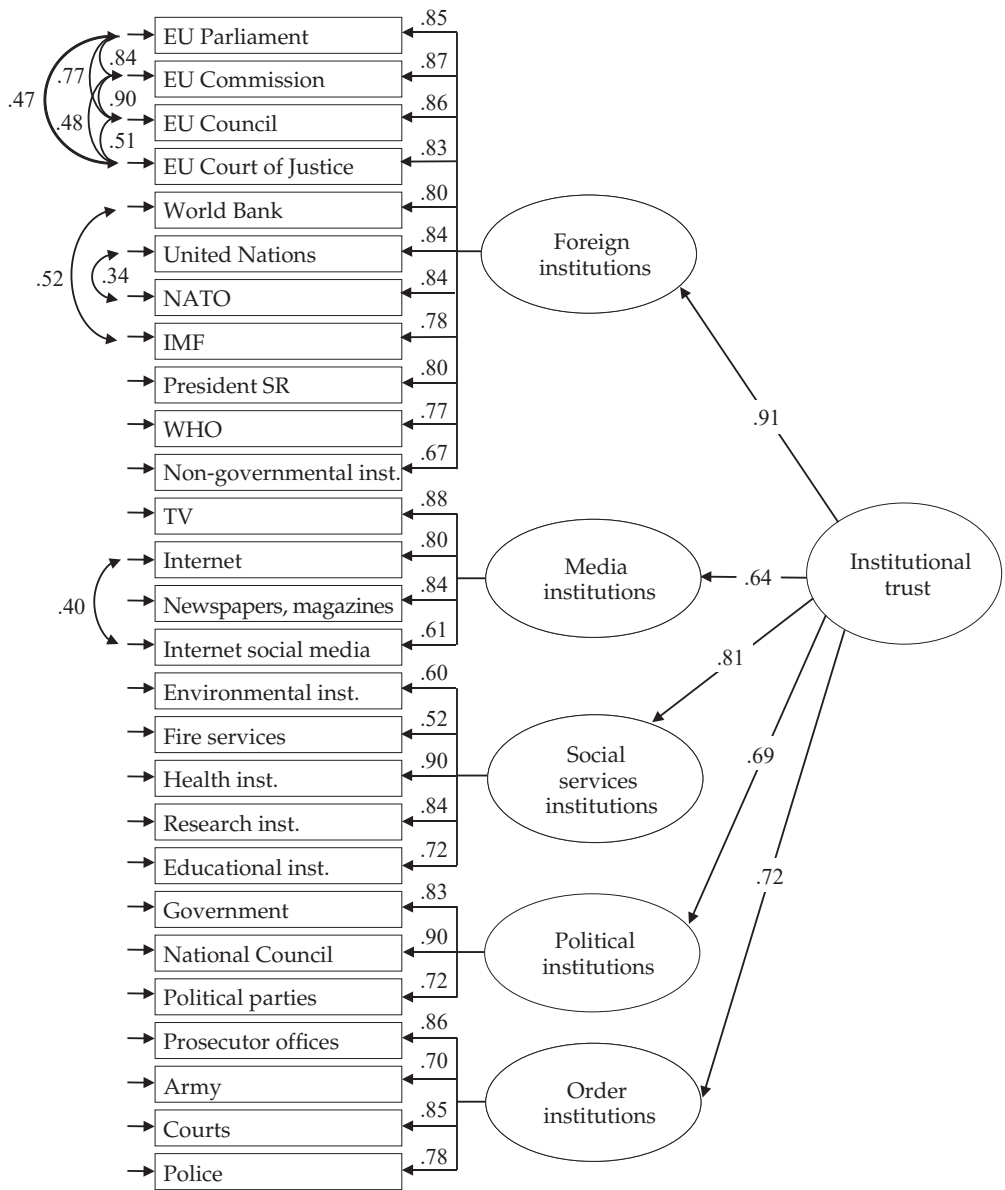


Table 5. Correlations between the five dimensions of the institutional trust construct and the interpersonal trust measures

Variables	1	2	3	4	5	6	7	8	9
1. Foreign institutions	–								
2. Media institutions	.50***	–							
3. Social services institutions	.50***	.37***	–						
4. Political institutions	.62***	.55***	.34***	–					
5. Order institutions	.50***	.31***	.49***	.50***	–				
6. Trust propensity	.17***	.21***	.24***	.20***	.19***	–			
7. DTT benevolence	.22***	.19***	.22***	.24***	.22***	.44***	–		
8. DTT integrity	.28***	.25***	.27***	.28***	.28***	.44***	.64***	–	
9. Social trust	.23***	.21***	.25***	.29***	.27***	.47***	.60***	.58***	–
10. Trust radius	.32***	.26***	.32***	.35***	.31***	.45***	.51***	.52***	.59***

Note: DTT benevolence – Disposition to Trust Scale benevolence subscale score, DTT integrity – Disposition to Trust Scale integrity subscale score, *** $p < .001$.

Criterion validity of the institutional trust construct factors

In the final step, we assessed the criterion validity of the five identified institutional trust construct dimensions by analysing their relationships with four interpersonal trust measures. Since the existence and the structure of the five dimensions were supported in both the EFA and CFA datasets, we decided to merge the two datasets in this analysis. Using the combined dataset of 600 participants, we again checked the factorial structure of the interpersonal trust construct and saved the factor scores as new variables representing the weighted scores for the five factors. These scores were, then, correlated with the interpersonal trust measures. As can be seen in Table 5, the five institutional trust dimensions showed weak-to-moderate positive significant relationships with four interpersonal trust measures. As could be expected from trust theory, institutional trust factors showed stronger correlations with each other than with the interpersonal trust measures. In general, these results could indicate a validity of the five institutional trust dimensions.

Discussion

The present paper aimed to explore the dimensionality of the institutional trust construct. To delve deeper into the characteristics of the dimensions, we investigated relations between institutional trust and propensity to trust, dispositional trust, social trust, and radius of trust. To the best of our knowledge, this study is the first to conduct such a comprehensive analysis of institutional trust in a Central European country. Additionally, as an extension of previous studies, this paper contributes to the literature by exploring how factorial analysis could shift our understanding of how various institutions are intertwined in terms of the trust Slovaks bestow on them.

The dimensionality of the institutional trust construct

Our results corroborate the multidimensional view of institutional trust. The CFA allowed us to distinguish five dimensions: foreign institutions, media, institutions providing social services, political, and order institutions. Considering the ecological validity of our findings, the dimensions emerging from our study showed expected relations with interpersonal trust constructs such as trust propensity, dispositional trust (benevolence and integrity subscales), social trust, and trust radius. Moreover, the dimensionality emerging from the present study reflects the classic separation of powers [see Waldron 2013]. First, the political institutions dimension corresponds with the *legislature*, i.e., the power responsible for making the law. Then, the *executive* and the *judiciary*, as related to law enforcement and settling legal disputes, are represented in a single dimension – order institutions.

Finally, the fourth power – *media* – forms a separate dimension in our analysis as well. The remaining two dimensions, foreign and social services institutions, were of minor importance at the time the classic model of powers was developed and, unsurprisingly, are considered to be conceptually different.

Importantly, while some of the dimensions are consistent with the dimensions identified in previous studies, others expand the typologies known from the extant literature. Specifically, our results show correspondence with the Rothstein and Stolle [2008] dimensions. Political institutions, selected through elections, are grouped around one dimension. Rothstein and Stolle [2008], labelled it *partisan* as it is to the greatest extent affected by the political programme of the ruling party or coalition. The second dimension – *order* – gathers institutions that are, by definition, apolitical but responsible for overseeing law implementation and enforcement (such as police, army, courts, and the prosecutor office). Concurrently, we also corroborated the existence of the media dimension. This is in line with the literature indicating that media trust may follow a different pattern than other institutions [Cook and Gronke 2001; Thomas et al. 2015].

Besides the similarities, our results also expand the current state of the art by detecting some new, perhaps country-specific patterns concerning the dimensionality of the institutional trust construct. First, foreign institutions include, indiscriminately, political, justice, financial, and health institutions. This may indicate that, when it comes to foreign institutions, participants did not distinguish them according to their object. A more important factor determining the trust level may be the fact that they are foreign. Interestingly, trust in foreign institutions was reported to be stronger than in domestic political institutions. In the literature [Harteveld et al. 2013], it is sometimes explained that trust in distant and less familiar institutions arises from the extrapolation of trust in better-known local institutions: if institutions at the national level are perceived as trustworthy and efficient, people may assume that other institutions function similarly well. However, since in Slovakia trust in national institutions is lower, we cannot speak of such extrapolation.

Instead, we could speculate that the mirroring effect might play a role. The mirroring effect reflects a situation when people rate their ingroup characteristics as opposed to the characteristics of outgroups. Depending on prevalent stereotypes, people tend to rate their ingroup characteristics as opposite to characteristics typical of a referential outgroup. This effect was found to be useful in explaining the differences in people's national stereotypes, showing that Slovaks often display outgroup favouritism towards other countries in the region [Hřebíčková et al. 2014]. Specifically, although Slovaks believed themselves to be psychologically warmer, they also felt less competent and assertive – traits they associated to a much greater extent with Austrians and Germans. A brief look at the specific levels of trust in domestic institutions may suggest that Slovaks tended to perceive the national political and order institutions as more untrustworthy than foreign institutions. In other words, following a similar psychological mechanism,

they might consider foreign institutions to be more competent and, thus, more trustworthy (less untrustworthy) than domestic ones. The sense of disappointment with local institutions may prompt the impression that, certainly, the grass must be greener elsewhere. To support this explanation, further investigations are required to see whether the difference between the trustworthiness of foreign and domestic institutions is systematic and stable in time. In addition, research that includes countries with either high or low levels of trust in domestic institutions could help to understand under what conditions the outgroup favouritism occurs.

Importantly, the stereotypes that lead to favouritism may flourish in the absence of frequent or deepened experiences and under circumstances in which there is a considerable psychological distance between an individual and the favourably stereotyped foreign institutions. Limited knowledge about those institutions could also explain why the relatively diverse foreign institutions in our study were mentally represented as one joint dimension. The findings corroborate the view that institutional trust is, to a large extent, endogenous to the performance of institutions themselves [Campbell 2004; Mishler and Rose 2001]. Since international institutions have a less direct effect on local life, their performance may be perceived as more efficient or less interfering and consequently the level of trust increases.

The advantages of using factor analysis to understand country-specific characteristics

Our findings indicate that factor analysis could inform the debate on institutional trust in local conditions as well. For instance, a curious pattern was found for the Office of the President of the Slovak Republic, which showed stronger correlations with foreign institutions than with any of the national, particularly political, institutions. This may be the result of a strong narrative that exists in Slovak social discourse. Specifically, some leaders of populist political parties – presenting themselves as national leaders – support a narrative claiming that the current president of the Slovak Republic is financed by foreign non-governmental institutions and serves foreign interests. In other words, along with the individual characteristics of the Slovak president, this narrative may shift people's perception of the position of the presidential office among other institutions. Another explanation could be that the powers of the president of the Slovak Republic considerably differ from those of other political institutions. In particular, the Office of the President may be seen as more independent of the domestic political scene and as acting more as a controller of legislative processes, which is often also the case of the foreign European political institutions included in our study.

Likewise, Slovak non-governmental institutions were included in the dimension of foreign institutions. Like the presidential office, they are often displayed as financed from outside the country and serving certain specific interests, like

changing the course of Slovak politics, promoting the LGBTQ+ agenda, or promoting migration politics. Thus, in line with van der Meer and Ouattara [2019], our analysis challenges the assumption of cross-national equivalence and points to the need to acknowledge micro- and macro-level endogenous factors to obtain a finer-grained understanding of institutional trust and the processes that shape it.

Moreover, in line with our expectations and corroborating the findings of international and domestic surveys [Eurobarometer 2021; MNFORCE et al. 2020], we found that trust in institutions in Slovakia is rather low, with most institutions rated as untrustworthy. Slovaks tend to be cautious in their attitudes towards most institutions, with the majority of scores clustering around responses indicative of a lack of trust and a rare few arousing slightly warmer responses from respondents. Specifically, trust in political institutions (including political parties, government, and parliament) showed to be consistently the lowest among all institutions included in the analysis, ranging between ‘distrust completely’ and the milder ‘distrust slightly’. The only group of domestic institutions that inspire trust is a broadly understood category of institutions that provide social services (such as the fire department, educational, research, and health institutions, environmental institutions, and social services), and this could have to do with people’s everyday experiences and perception of these institutions as generally promoting citizens’ wellbeing. In other words, in line with the efficiency hypothesis [Mishler and Rose 2001; Campbell 2004], immediate favourable experiences could help sustain confidence in these institutions – possibly despite the poor governance of generally obstructive politically-controlled institutions.

Much has been written about low levels of institutional trust in post-communist countries, which has been blamed on corruption, nepotism, and public disappointment [e.g. Lovell 2001]. Nearly thirty years after the transition, it may seem, thus, that Slovakia remains heavily burdened by its post-communist heritage. Our findings contribute to the debate by indicating that, although non-negligible exogenous and cultural factors may not be decisive in shaping institutional trust in specific countries, the variability of trust across dimensions and particularly the higher trust shown in foreign international institutions indicate that trust in institutions may be driven more by perceptions of their efficiency. Specifically, theories stressing endogenous sources of institutional trust point to economic performance: the institutions that produce favourable economic outcomes for citizens are perceived as more trustworthy [Mishler and Rose 2001; Campbell 2004]. Although this is something to be investigated in the future, it seems reasonable to expect people’s sense of economic insecurity to play a key role in fostering scepticism about institutions in Slovakia. Recent studies and surveys found that the scale of financial anxiety in Slovakia is above the EU average, with nearly half of Slovaks expressing concerns about the increasing cost of living and a third struggling to make ends meet [Adamus and Grežo 2021]. Consequently, institutions – particularly local ones – are likely to be blamed for failing to provide financial security.

Limitations and future directions

Although comprehensive, the present study is not without its limits. First of all, it is cross-sectional and thus provides findings relating to a specific temporal and geographic context. However, trust in institutions is very context-dependent. Previous studies showed that trust differs considerably across the countries included in individual surveys [Eurobarometer 2021; European Social Survey 2016; van der Meer and Ouattara 2019], but it also fluctuates with time and can be easily stirred by external shocks such as the COVID-19 pandemic. Specifically, a longitudinal survey in Slovakia showed a systematic decline of trust in numerous institutions, with only a slight re-bounce for the healthcare system and science [MNFORCE et al. 2020]. This indicates that even comparing data collected within a single survey, we need to remain very sensitive to local conditions that could affect trust in specific institutions or their groups, influencing the dimensionality of institutional trust in a given country and at a given time and possibly making it discernible from the dimensionality of institutional trust in other countries. Given the formative nature of the institutional trust construct, more research in countries with various institutional systems (e.g. presidential or parliamentary systems) is needed to understand the factorial structure in various contexts and conditions. In other words, although the institutional trust construct is not cross-nationally equivalent, searching for some systematic patterns by comparing the findings from different countries may contribute to the debate about the definition, dimensionality, and measurement of institutional trust.

To delve deeper into the dimensionality of institutional trust, future studies could also investigate the variation in the levels of trust within dimensions over time. Specifically, it would be interesting to explore whether a sudden drop in the level of trust in a certain institution may negatively affect the level of trust in other institutions included in a specific dimension. Observing the variability over time in relation to contextual changes – such as crises or sudden exogenous shocks – could significantly contribute to our understanding of antecedents and the dynamics of institutional trust. Second, it is possible that antecedents of institutional trust differ across countries and thus responses to crises could vary as well [Campbell 2004]. The latter hypothesis is substantiated by the COVID-19 pandemic and the varying degree to which it affected institutional trust across the world [Bottasso et al. 2022].

In addition, future studies could also investigate the relationship between institutions' performance – or the perception thereof – and their trust in more detail. Although the present study investigated a broad range of institutions, we asked only about a generalised level of trust in each of them. In line with the theory of particularised trust [Bauer and Freitag 2018], future studies could attempt to embed the measurement in more specific contexts and inquire into particularised types of trust related, for instance, to the institutions' competency and efficiency in fulfilling their statutory functions.

Finally, although the initial exploratory analysis revealed six factors, we were able to confirm only five of them. The financial institutions turned out to be under-defined in our study. This, however, does not necessarily imply that the financial institutions factor should not be perceived as a part of the institutional trust construct. A further investigation using more items is needed to determine whether this factor is an inherent part of the institutional trust construct.

Conclusion

As well as being informative for research on the dimensionality of institutional trust, the present study contributes to theory by opening up new research avenues and posing questions concerning the conditions in which institutional trust can flourish or, conversely, perish. Although our findings on the dimensionality of the institutional trust construct are far from being conclusive, we believe that they convey the important message that trust in institutions is not a homogenous concept and the antecedents of the trust bestowed on various institutions could differ considerably not only within a given society but also perhaps between countries as well. Conceptualising trust in institutions as a single factor that is universal across social and cultural contexts may result in a lack of attention being paid to other processes that shape trust in various institutions across individuals and groups. Our findings suggest that researchers should abandon measuring institutional trust as a single general index that comprises several distinctive institutions. On the contrary, they should carefully consider and explore how institutions are grouped together into specific factors and how these factors relate to each other. In this sense, no universal form of the institutional trust construct exists. Rather, institutional trust should be perceived mostly as a formative construct that helps to describe the complexity of interrelated factors whose occurrence is dependent on contextual factors. Lastly, the factorial approach not only indicates that the criteria applied in evaluating the trustworthiness of institutions may differ, it also shows that there is scope for considering the role of individual differences and both personal and collective experiences in shaping trust in institutions critical to society's well-being.

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Bourdieu Canonised?¹

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Abstract: This article examines Pierre Bourdieu's canonical status among the sociologists of the second half of the 20th century. Particular attention is given to his own work, and other work inspired by his approach, on European integration and post-communist transition.

Keywords: Bourdieu, canons in social theory, European integration, post-communist transition

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One of the most recent articles I published was on the idea of 1920 as a caesura in social theory [Outhwaite 2020]. I explore here another possible caesura in English-language social theory, located around 1970, plus or minus 2. (1968 was a less dramatic year in the West than in Prague, but very influential in changing world-views, including in social theory.) I was completing my first degree in 1971, and people who work on generations rightly caution against attributing too much significance to the years of one's own coming of age. In this case, however, I think there was a substantial change of gear, in an English-speaking world in which sociology was a rising field but 'theory' had been something of a poor relation. (Having lost my European citizenship, which survives in ghostly form only until my passport expires, I should apologise for this parochial reference. The temporalities of the reception of social theorists across Europe and the rest of the world would be a massive project.)²

Gurminder K. Bhabra and John Holmwood have noted with a touch of irony that their recent book, *Colonialism and Modern Social Theory*, came out just 50 years after, and echoed the title of, Anthony Giddens' *Capitalism and Modern Social Theory* [Giddens 1971]. Around the same time as Giddens' extremely influential book we had Bourdieu's *La Reproduction* [Bourdieu 1970], following on from *Les héritiers: les étudiants et la culture* [Bourdieu 1964] and which transformed the rather dusty field of the sociology of education. In 1968 he published, with

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² On this issue in relation to Bourdieu, see for example Susen and Turner [2011].

Jean-Claude Chamboredon and Jean-Claude Passeron, *Le métier de sociologue: Préalables épistémologiques* [Bourdieu et al. 1968] and, in 1972, his theoretical magnum opus, *Esquisse d'une théorie de la pratique*, published in English in 1977.

In 2009 I suggested that Bourdieu and Giddens constituted something like a 'canon' in late 20th-century British social theory, along with the subsequent rise of Zygmunt Bauman and Ulrich Beck. In 1970 Bourdieu, born in 1930, had been in the game for some time, while Bauman, born in 1925, had had a substantial career in Poland, until his expulsion in the antisemitic and antiliberal pogrom of 1968, and was about to pick it up again in Leeds. Giddens, born in 1938, was a youngish lecturer at Cambridge, while Beck, born in 1944, was awarded his doctorate in 1972 and hit the news in 1986 with his book *Risikogesellschaft* (Risk Society), whose publication was soon followed by the Chernobyl nuclear disaster.

While Talcott Parsons had earlier been responsible for raising the profile of what came to be seen as classical European social theory, with as his principal protagonists Durkheim, Weber, and Pareto, in the early 1970s the main driver was probably the revival of interest in Marx, with the theorists of the turn of the century drawn in his wake, where they were not explicitly counterposed to him.³ Bauman, alone among the four, had been an explicit Marxist, and he remained massively influenced by Marx as well as by 'Simmel, who started it all' [Bauman 1992]. Bourdieu's sociology, too, could be called post-Marxist, if the term had not been attached to rather different intellectual and political projects.⁴ Giddens had to spend a good deal of time in the 1970s differentiating his approach from Marxism, whereas Beck's reference point in the 1980s was more clearly Frankfurt critical theory. Both Bourdieu and Giddens can be seen as post-structuralist thinkers, not in the usage ascribed in the English-speaking countries to Foucault, Deleuze/Guattari, and others, but in the sense that they reacted to structuralism (as well as to Goffman and to ethnomethodology).

Unlike Giddens, the other three thinkers did not on the whole go in for rediscoveries and reappraisals. Bauman published a book on *Critical Sociology* [1976] and another on *Hermeneutics and Social Science* [1978], but then moved on to more substantive topics, beginning with his book on intellectuals, *Legislators and Interpreters* [1987].⁵ Bourdieu's *Esquisse d'une théorie de la pratique* [1972], trans-

³ Classics of the latter genre were Göran Therborn's *Science, Class and Society* [1976] and Martin Shaw's *Marxism and Social Science* [1975], and of course the work of Barry Hindess, Paul Hirst, and others. As Therborn [2000: 37] later noted, '...the multiple voices around the past turn of the century have been filtered into a canon of select classics, which still constitute most of the core that sociological education has'.

⁴ Bridget Fowler [2011: 33] calls him 'one of the great heirs of the Western Marxist tradition'. As she notes, 'Bourdieu's whole corpus brilliantly examines a central Marxist idea: the ossification of fluid individuals into a dominant class, with enduring interests and the inheritance of class powers' [Fowler 2011: 35].

⁵ His introduction to the 1999 edition of *Culture as Praxis* [Bauman 1973] traced developments over the intervening years.

lated in 1977 as *Outline of a Theory of Practice*, was in large part a critical engagement with structuralism, and the edited collection *Le Métier de sociologue* [1973], translated after a considerable lag in 1991 as *The Craft of Sociology*, inevitably included such themes. On the whole, though, Bourdieu avoided them. Beck, except in his doctoral thesis, published in 1974, entirely avoided works of expository critique.

Another important aspect for all four is the interplay between their strictly academic activities and their broader roles as public intellectuals. None of them, I think, particularly sought the latter role, whether from modesty or, particularly in Bourdieu's case, a suspicion of the cult of the intellectual in France.⁶

Why just these four? (I don't believe in either the Christian evangelists or the horsemen of the apocalypse – though for some British sociologists these four were similarly suspect as making the subject more 'continental'.) I excluded Foucault, who, like Bourdieu, enriched the similarly dusty area, at least in Britain, of the sociology of deviance but who would have hated to be called a sociologist, and Habermas, who always followed a double track in philosophy and sociology. (His friend Ralf Dahrendorf said he was always really a philosopher.) Margaret Archer probably deserved a place among these 'theory boys' [Burton 2015], but I felt that she had not had quite the same broad impact. Stuart Hall was a major figure in sociology and the emergent field of cultural studies, but not so much in sociological theory.

Conversely, several people thought there should have only been three, questioning the inclusion of Bauman as not a real sociologist, Giddens as a bit too eclectic, or Beck as too journalistic. Bourdieu was, I think, exempted from such critiques, though they might have fastened on the way in which his theoretical and methodological engine was trundled around like a medieval siege weapon from one target to another.

It is Bourdieu's versatility which makes him unique in this field. It is hard to think of a topic which he did not either address himself or at least include in the pages of the *Actes de la Recherche en Sciences Sociales*, which he founded in 1975, just after my caesura year, and which has continued since his death in 2002. No. 150, in 2003, summarised his contribution to anthropology, his other home port (though he also ranged over philosophy – for example, his book on Heidegger – art history, and feminist studies). Already in 1962 he was describing Algeria in terms of a 'choc des civilisations' and in *Homo Academicus* [Bourdieu 1984] he described processes of polarisation and the devaluation of others' expertise in the language of 'camps' and 'civil war' – something which we are all too conscious of today [Outhwaite 2022]. It could be argued that we are currently experiencing

⁶ See his sardonic discussion in Appendix 3 to *Homo Sociologicus* of 'The Hit Parade of French Intellectuals' [Bourdieu, 1988 [1984]: 256–270]. For a more recent study, see Jean-pierre and Natanson [2008]. Bourdieu did, of course, eventually come to embrace the role of militant public sociologist.

a kind of fusion of Bourdieu's 'crises of reproduction' and 'political crises' (produced by exogenous shocks), with social media as a possible example of such a shock.

In the rest of this talk, I shall focus on the two areas of Bourdieu's work which I have addressed in most detail: *postcommunist transition* and *European integration*. Larry Ray and I, in our book in 2005, noted that along with the return of capital in its literal or 'western' sense, the postcommunist world was reconfiguring other forms of capital central to Bourdieu's conceptualisation, as well as to that of others such as James Coleman and Robert Putnam [Grix 2001]. To give a crude example, the exchange rate in the former satellites between competence in Russian and that in English, French, or German changed as abruptly as when the rouble was devalued by 90% while I was on a short visit to Moscow. (The hotel cashier without blinking gave me nearly 100 times more roubles for my pounds than when I had seen her a couple of days earlier.)

In our analysis, Larry Ray and I cited the slightly comic but then current example of groups of Russians estimating the value of their collective expertise and asking banks to match it with a business loan. A decade earlier, Bourdieu [1983: 55] had noted, in the context of ostensibly meritocratic social selection in Western societies, that 'the more the official transmission of capital is prevented or hindered, the more the effects of the clandestine circulation of capital in the form of cultural capital become determinant in the reproduction of the social structure'.

What Konrád and Szelényi [1979] had described as the 'intellectualisation' of the communist bureaucracy, a process also described by Peter Ludz [1968] in his *Parteielite im Wandel*, has also inspired Eyal, Szelényi, and Townsley's subsequent work. In our book we mentioned the rapid development by postcommunist elites of a 'sense of the game', which parallels, we suggested, the role of Weber's 'Protestant ethic' in early capitalism [Outhwaite and Ray 2005: 32].⁷

I returned to this theme in 2007, noting that although Bourdieu did not write much about this part of the world, the exception which proves the rule is a short lecture given in East Berlin on 25 October 1989, and reprinted under the title 'The Soviet Variant and Political Capital', in *Practical Reason* [Bourdieu 1998: 14–18]. Here he again raised the question whether, 'in a system which officially and to a large extent in practice outlaws economic capital, the relative weight of cultural capital...is proportionally increased' [ibid.: 16]. He went on to address the issue of the conflict between the nomenklatura, with its political capital, and the bearers of academic capital. If I may be allowed to quote what I wrote there:

⁷ See also the exchange between Eyal, Szelényi, Townsley, and Michael Burawoy [2001] and the fascinating account of Chechnya by Georgi Derlugian [2005]. More recently, Ly Chu [2018] has applied a similar approach in relation to Vietnam. Chu's PhD thesis can be found at: <https://openaccess.city.ac.uk/id/eprint/16166/>.

...as the Czech sociologist Petr Mateju (2002–3: 380) writes, postcommunism has been an ideal laboratory for testing Bourdieu's hypotheses regarding the role of various forms of capital and their conversions in the reproduction of inequality and in shaping life-success. Bourdieu's model of social stratification, which lays especial importance on cultural or symbolic capital ... can indeed be shown to be of particular relevance to the post-communist world, in which, as Georges Mink (2004: 462) puts it, individuals have to get by in a system which they did not know how to read from the start. [Outhwaite 2007]

To cut a long story short, whereas Putnam's analyses of Italy and the US tend to treat social capital as a public good, and something which unproblematically conduces to social development, Bourdieu's focus is closer to Marx in looking at the way in which these forms of capital and the ways in which they are used by their bearers reinforce social inequalities and antagonisms between classes. This is a system in which foreign contacts, languages, and so on may be more important for individual life-chances than economic resources or formal qualifications derived from the communist period.

This is a persisting effect, as noted by Kovách and Kučerová [2006], in what they aptly call a 'project class' of well-educated young semi-professionals equipped to apply for and manage EU and other externally funded projects. As one German respondent complained in Špaček's study of the Saxon-Czech border region,

I would say that in our region the language barrier is the biggest problem, because it makes it very hard to have easy everyday contacts to somebody on the other side of the border. Just take the phone and call somebody is for most of the people in our region more or less impossible. [Špaček 2018: 193]

Here I move to the theme of European integration, which I addressed briefly in 2016 and more substantially in 2017, and in my most recent book in 2019. In a chapter for the new edition of the *Routledge Handbook of Contemporary Social Theory* [Delanty and Turner 2022], I realised there was more to say about Bourdieu in relation to this than I'd initially thought. Again with apologies for quoting myself, here are the relevant paragraphs:

Like his contemporary Alain Touraine (1994), Pierre Bourdieu only occasionally referred to European integration, and in Bourdieu's case pejoratively: Niilo Kauppi (2018: xix) writes that 'For him, European integration was nothing more than a capitalist project. He did not see anything productive in it.' Bourdieu however increasingly saw Europe as the appropriate base for social movement activity as his work took on a more activist character. In resisting neoliberalism, a special place should belong to 'the state: the nation-state, or better yet the supranational state – a European state on the way toward a world state – capable of effectively controlling and taxing the profits earned in the financial markets and, above all, of counteracting the destructive impact that the latter have on the labour market'. [Bourdieu 1998]

As Kauppi (2018: 56) points out, in the EU, 'in contrast to national settings such as France analyzed by Bourdieu, a multitude of highly structured national political spaces are partly united by a more heterogenous transnational space.' Yet Kauppi and many other scholars have used a Bourdieusian framework to analyse the European 'field', in which political actors mobilise national and European political resources and exchange one for the other. Much of this work has centred on the European Parliament, which has proved a valuable site for smaller parties and women politicians marginalised or excluded in their home states (Kauppi 2005). There are also major studies of the Commission and the broader field of 'Eurocracy' (Shore 2000;⁸ Georgakakis 2009; 2010; 2013; 2018) and the crucial role of EU law in the integration process (Vauchez and de Witte 2013).

The variant of a Bourdieusian approach developed by Luc Boltanski and his various collaborators in their 'sociology of critique' has been less prominent so far [Outhwaite and Spence 2014]. Without going into the disputed question of how far Boltanski and his collaborators diverge from Bourdieu [Fournier 2022: 54–55], it is worth mentioning that Boltanski's emphasis on the fluidity of social life, the idea of regimes of argumentation, justification, and *épreuves* is well suited to the essentially contested space of the EU and its blend of what Keith Middlemas [1995: xx] called its formal and 'informal politics'. To cut a long story short, Member State representatives are constrained both to demonstrate expertise and to frame their arguments in terms of the common interest of the Union. In a more direct link to Bourdieu, studies of European Commission officials might look back (and perhaps have done) at the distinction which he and Monique de Saint Martin drew in 1982 in their study of French bishops, between the 'oblates', who have spent their whole lives in the clergy, and the 'héritiers', who join the episcopacy after earlier careers outside and arrive with external intellectual and social capital [see Bourdieu and de Saint Martin 1982; Robbins 2019: 199–200; 2022: 131–138].⁹

Ann Zimmermann and Adrian Favell [2011: 507] make a powerful case for the complementarity of the three main contemporary theoretical approaches to the EU represented by Foucault, Bourdieu, and Habermas:

The notion of governmentality provides an account of macro-structural transformation of the EU seeking to redefine the object of study in a new language of politics. [...] The political field approach, rather, concentrates more on micro-structural transformation: politics at the level of actors, their identities and relationships, and

⁸ Cris Shore, who had earlier conducted an ethnographic study of the European Commission, quoted one official's definition of the Commission as 'a civil service *with attitude*' [Shore 2000: 143].

⁹ The term 'héritiers' is of course also used in Bourdieu's study of students' cultural capital. Incidentally, Jules Monnerot wrote ironically of French 'sociologie établie (au sens où les Anglais disent l'Église établie)' [Hollier 1995: 572].

their struggles in particular contexts. The public sphere approach sits somewhere in the middle, focussing on meso-level transformations in European society associated with the EU as it creates new public debates about Europe.

The possible intersections between these approaches to the EU reflect broader affinities, also with Elias [Georgakakis and Weisbein 2010], which were not developed at the time and were cut short by the early deaths of Foucault in 1984 and Bourdieu in 2002. To put it very briefly, I would suggest that a critical theory approach (which is not confined to public sphere issues) engages most fully with the challenges and *enjeux* of the integration project, while the other two provide valuable reminders of the power games behind what the ‘object language’ (as Kauppi describes it) of European public servants tends to describe in overly irenic and optimistic terms. The enrichment of EU studies by these theoretical currents reflects the gradual emergence of Europe from national blinkers and its academic expression in what Hermínio Martins [1974] and later Ulrich Beck called ‘methodological nationalism’.

I met Bourdieu only once, in 1984, when we were both on the road in Toulouse. He was presenting and signing *La Distinction* and I was there to give a paper in the wake of Orwell on political language in East and West [Outhwaite 1986]. This was also the year in which Bourdieu wrote a preface to the English edition of *Distinction* [Robbins 2019: 201] and in which Polity Press was founded in Cambridge by Giddens, John Thompson, and David Held and began to publish him. As Derek Robbins [2019] has noted, this was also the decade in which Bourdieu reflected more systematically on his own position in the intellectual field, beginning with his inaugural lecture at the Collège de France in 1982.

Bourdieu was also travelling abroad more in the 1980s, and his international reputation probably reinforced that in France.¹⁰ Although the term globalisation was not current until the 1990s, intellectual life was becoming more global, not least in France, where translated academic works became strikingly more prominent in the bookstores. Bourdieu [1996: 145] complained, however, in a rather prickly paper, that ‘texts such as mine, produced in a definite position in a definite state of the French intellectual or academic field, have little chance of being grasped without distortion in the American field...’. This should probably not be seen as narcissism; Robbins [2019: 207] suggests that the tendency in the US to understand his work in terms of that country’s own rather rigid disciplinary boundaries may be the explanation. Bourdieu returned to this theme in an essay on ‘The Social Conditions of the International Circulation of Ideas’ [Bourdieu 1999].

Bourdieu would of course have hated the notion of canonicity.¹¹ In *Homo Academicus* he uses it only of academic disciplines, following (and citing) Kant’s

¹⁰ This happened later also to Thomas Piketty [Walsh and Lehmann 2021: 30].

¹¹ See, for instance, his chapter on ‘the philosophical institution’ [Bourdieu 1983].

‘conflict of the faculties’, though more relevant in this context, he cites, in the Preface to the English translation,

the astonishment of a certain young American visitor ... to whom I had to explain that all his intellectual heroes, like Althusser, Barthes, Deleuze, Derrida and Foucault ... held marginal positions in the university system... [Bourdieu 1984: xviii]

It is, however, hard to see how Bourdieu can escape his canonical status. Marcel Fournier [2022: 49, 57] puts him ‘on the level of Durkheim, Marx, Weber, or Parsons’ and calls him ‘our last classical sociologist’. The test of time has not run so long for Bourdieu as for these others, but I should also reiterate my admiration for his astonishingly productive and inspiring work.

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MEASURING INCOME POVERTY IN THE EU: VISEGRÁD COUNTRIES AND EUROPEAN EMPIRICAL DATA

Martina Mysíková

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countries, and includes appendices with results

for EU countries. After introducing the data,

which is drawn from EU-SILC 2005-2018 and HBS

2010, the main analytical chapter focuses on

methodological issues connected to measuring

income poverty in a European context, with

a focus on the suitability of the currently applied
equivalence scales. The sensitivity of the at-risk-

of-poverty rate to the OECD-type equivalence

scale differs across countries. If the equivalence

scale applied does not fit national conditions

well, resulting income poverty rates may fail

to accurately inform social policies, especially

in countries with high sensitivity. Two sets of

county-specific equivalence scales are estimated

in this work: an expenditure-based scale using

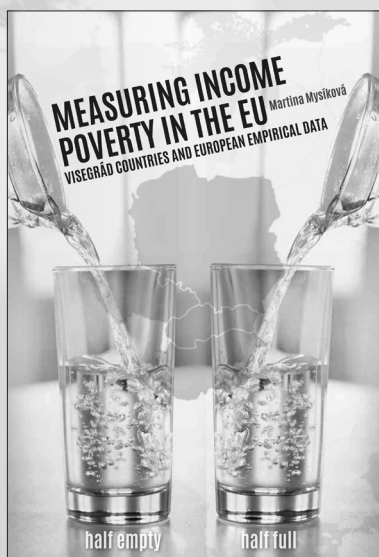
HBS data and a subjective equivalence scale

based on subjective poverty lines and EU-SILC

data. The book discusses the impacts of the

estimated scales on income poverty rates and provides alternative subjective income

poverty measures, which can usefully supplement objective income poverty data.



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Charles Goodhart and Manoj Pradhan:
*The Great Demographic Reversal:
 Ageing Societies, Waning Inequality,
 and an Inflation Revival*
 Cham 2020: Palgrave Macmillan, 280 pp.

Contemporary societies are facing several challenges that could have a big impact on economic growth, the sustainability of welfare states, and international trade. One challenge is climate change, which is expected to disrupt international supply chains and reduce agricultural output and workers productivity' as a result of extreme weather events. Similarly, the COVID-19 pandemic has highlighted how infectious diseases are becoming more common and can disrupt global supply chains, overwhelm the health-care sector, and limit international travel. Nevertheless, future societies face another challenge that relates to the demographic processes that have been developing in the global population in recent decades [see Goerres and Vanhuysse 2021].

In *The Great Demographic Reversal*, Goodhart and Pradhan offer interesting argumentation on how demographic processes have affected the world economy in the past three decades and provide a glimpse of the trends to come. More specifically, they argue that in the 20th century demography and globalisation largely influenced the global supply of labour and this affected economic growth, nominal interest rates, inflation, and labour's bargaining power. In particular, they highlight the role that China played from the end of the last century as a major supplier of labour in the global economy. However, the near future looks different, as China and other advanced economies are facing problems such as rapid population ageing and an increasing age dependency ratio (i.e. the number of people older or younger than the working age divided by the number of people of working age). These changes in the population structure raise the question

of how demography affected the world economy in the past and how it will do so in the future.

Demography has often been used to understand how population structures affect societies. For example, in the 18th century Malthus described how exponential growth of the population could put pressure on the availability of resources, which grow arithmetically, resulting in the famous the 'Malthusian Trap'. However, this proposition was largely disproved in subsequent years thanks to a substantial increase in productivity and economic growth. Nowadays, the debate on the sustainability of population growth is still alive and divides scientists betting on the impact it will have on the prices of different commodities (Spinney, 2021). Nevertheless, focusing merely on population quantity leads us to neglect other important ways in which demography can exert societal changes. In fact, one important metric is the age structure of a population. Consequently, the change in the shape of the population pyramid that is currently occurring in most countries raises important questions about the impact different age structures have on society.

Rapid population growth has several societal consequences, one of which is a larger supply of labour in the economy. The model of demographic transition asserts that population grows in five phases and it happens rapidly. In the first stage, it predicts no population growth as deaths and births are both high. In the second stage, it forecasts a decline in deaths and a rapid increase in the total population that slows slightly in the third stage and stops in the fourth and fifth stages, at which point population decline may start as a result of low births. Goodhart and Pradhan suggest that the momentum created by rapid population growth causes a substantial increase in the supply of the working age population in the economy. Some of the possible consequences of the abundance of

labour are a decrease in the bargaining power of workers, an increase in the profitability of capital, and an increase in inequality. Additionally, in a globalised world, the stock of available labour in one country has spillover effects in the economies of other countries. For example, companies might decide to relocate industries to other countries (e.g. U.S. industries producing goods in China) or citizens could decide to migrate from countries with an abundance of labour to countries with higher capital (e.g. migration from East Europe to West Europe following the collapse of the Soviet Union). Goodhart and Pradhan relate the global abundance of labour and the increase in inequality to the political developments of recent decades. They explain the success of populist and nationalist parties as resulting from the dissatisfaction of citizens in advanced economies that have experienced stagnation in real wages. Populist parties have been promoting policies that would limit immigration and protect local employment for the losers in globalisation. Currently, these global demographic patterns are reversing and a call for an analysis of the 'Great Demographic Reversal' is already happening in several countries and is expected to accelerate soon in many others.

Goodhart and Pradhan call the current demographic shift in the global population the 'Great Reversal'. In their analysis they use the World Bank classification of countries into pre-dividend, early-dividend, late-dividend, and post-dividend categories, which closely correspond to the phases of the demographic transition model, and indicate whether a country is benefitting from a demographic dividend or not. Most advanced economies are in the late-dividend and post-dividend phase or close to entering a phase in which they do not have a large stock of working age population. Conversely, most developing countries are still waiting to gain from the demographic dividend or are starting to gain

from it. Importantly, the ageing advanced economies account for the largest share of the global Gross Domestic Product (GDP) and GDP growth in past decades and the demographic shift could highly impact their future contribution to the global economy.

The authors highlight some of the main consequences of the Great Reversal. First, they discuss how a larger share of elderly could cause a crisis of care and a considerable increase in public spending. Second, they expect rising inflation resulting from a larger share of dependents in the economy. Higher inflation could also lead central banks to raise interest rates. Third, the authors link the increase in within country inequality and the rise of populist parties in recent decades to the abundance of global labour. Consequently, they forecast a coming shortage of labour, which will give workers stronger bargaining power and increase their wages, as predicted by the Phillips curve.

Japan is often presented as an example of how population ageing will impact other countries in the future. For example, in a special report on Japan *The Economist* described Japan as 'A country on the Frontline' and titled the article 'An Ageing Country Shows Others How to Manage' [*The Economist*, 11 December 2021]. The article highlighted the effort Japan has made to increase the labour market participation of the seniors, as now more than half of people in the 65–69 age group are working. However, is Japan a good example for other countries? Goodhart and Pradhan are sceptical about this. The authors fairly admit that Japan offers a contrasting example to many of their propositions and predictions. For example, the wages of Japanese citizens did not substantially increase with a decline in unemployment. However, several factors explain the peculiarity of Japan compared to other countries. First, Japan has so far been able to substitute national labour with production

in China, but this option is no longer available for other countries or for Japan in the future. Second, the Japanese labour market is different from the labour markets in western countries because of cultural specifics that render it inflexible to changes in employment. Third, the labour participation rate of seniors in many advanced economies is not comparable to the levels reached in Japan, and it is difficult to expect a fast increase in seniors' participation given the serious political consequences faced by politicians who want to reform the pension system. For these reasons, Goodhart and Pradhan find that Japan does not offer tangible solutions for the countries that soon will face similar demographic problems.

If Japan does not offer lessons on how countries can cope with population ageing, how will future societies manage the consequences of these demographic processes? The authors present an interesting discussion of solutions and policies that highlights the advantages and disadvantages of each. More precisely, the authors have serious doubts that pension system reform, immigration, or the demographic momentum of the African continent and India will be enough to counteract the demographic challenges ahead. For political reasons, pension system reform and immigration are not considered feasible solutions. Pension system reform is politically very complicated. In several countries politicians have tried raising the age of retirement based on longer life expectancy, but such plans have been met by strong resistance from the electorate and grim prospects in the following election. Equally, immigration is a politically heated topic that has led to the emergence of several political parties that seek to limit it. Even if immigration were to receive greater political support, a sizable level of immigration would be required to offset population ageing. Additionally, the booming population in African countries and India will not

be able to emulate the role played by China for structural and political reasons. The unfeasibility of the above-mentioned options leaves space for a few alternatives to counteract the higher public expenses faced by governments. More precisely, the authors propose a broad set of taxes that could be used to pay for the higher public debt resulting from higher public health costs and pensions. Relatedly, the current COVID-19 pandemic has raised questions about how it may have further exacerbated the macroeconomic trends described above. The authors, in a postscript, highlight how the pandemic may have accelerated the economic trends that the 'Great Reversal' was expected to usher in, causing an increase in government debt, wages, and inflation.

The Great Demographic Reversal is a great read that intelligently combines theoretical assumptions with empirical evidence and covers a broad range of aspects related to demography and macroeconomy. Additionally, Goodhart and Pradhan interestingly discuss how these processes might explain trends in income inequality and political behaviour such as the rise of populist parties. Despite the book's big aspirations, it reads fluidly and is nicely structured, and it contains graphs and charts that help the reader grasp the substance and subtleties of main ideas it proposes. For this reason, the book has the benefit of appealing to a large audience of both academic and non-academic readers. Among academic readers, macroeconomists may find it interesting to learn how demographic processes on a global scale can affect national economies. Demographers can discover how the population processes they study relate to central economic outcomes such as inflation and economic growth. Political scientists may find the discussion of the rise of populism and how this relates to globalisation and the available stock of global labour both stimulating and controversial. Microeconomists and sociologists may find an alternative

explanation for the growth of inequality and the decrease in the bargaining power of labour. And welfare state researchers can find a thorough discussion of how the increase in the age dependency ratio will affect public spending, which will require policies that raise supplementary taxes to pay for these expenses. Overall, this is a timely book that effectively contributes to our deeper understanding of how global demographic processes have affected societies in the past and could do so in the future.

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Oded Galor: *The Journey of Humanity: The Origins of Wealth and Inequality*

London 2022: Penguin Books Ltd, 304 pp.

This book offers a comprehensive overview of the history of our species, describing the journey of humanity starting in Africa some 300 000 years ago. Rather than focusing on specific occurrences of historical importance, Galor pays attention to the fundamental mechanisms working since the emergence of the species, moving humankind through hundreds of thousands of

years of stagnant population size and living standards and towards the explosion of both after the industrial revolution. What Galor calls 'the cogs of change' had been turning under the surface all along but have had different consequences across the planet. The book poses the question: what has caused humanity to achieve its still-expanding growth? And further, wherein lie the roots of its immensely unequal distribution?

In the first part of the book, Galor sets his sights on explaining the mystery of growth and why humans, unlike any of our co-species on this planet, have managed to escape the Malthusian Trap. Named after Thomas Malthus, the Malthusian equilibrium captures the human tendency to utilise the affluence reached through technological advances into increase in procreation, which in turn leads to exhausted resources and again deteriorated living conditions. While this mechanism has been the rule for most of human existence, in the past two centuries it has ceased to be so. To explain the sudden and ever-accelerating growth after the extended period of stagnation, Galor considers one 'cog' at a time until he has drawn a simple yet surprisingly powerful explanation, in which human capital plays a significant role. Galor argues that it was the technology-facilitated increasing return to education that pushed parents to re-evaluate the quantity-quality trade-off of producing offspring and to choose investing into their existing children rather than bearing more. This drop in fertility and decrease in hungry mouths per household finally led to progress in human living standards in the long run. The growing human capital worked as raw material for the process of industrialisation, which in turn multiplied the demand for further human capital investments within the industrialised nations. Thus, 'the great cogs of human history' have made it possible for our species to reach for the stars.

Yet the question remains: Why has the almost miraculously expanding growth affected individuals and populations so unevenly across the world? In the second part of this book Galor re-focuses his task of explanation and puts forward a rationalisation of the mystery of inequality. Starting from the usual suspects, slavery, institutions, and cultural evolution, layer by layer causes are examined to understand present-day inequality both within and across nations. Gender inequality within a society is explored through the gender-bias built into the agricultural tools that were employed thousands of years ago. The upper body strength that was required to use the plough resulted in a persisting gender bias in how work is divided between the genders. Further, Galor points to regional differences in climate and geographical characteristics, such as soil quality and disease environment, and the effect they had on the development of regions. Where crop cultivation called for it, the tendency for future-oriented thinking flourished. Where the land was more suitable for large plantations, European settlers tended towards slavery. And so, argues Galor, the unequal spread of growth across the globe was brought about by the differences in the physical conditions faced in different parts of the world. Drawing on his own empirical work, Galor spends ample time on exploring diversity as one of the base roots of inequality. According to his thesis, as the hunter-gatherer tribes first left Africa, they formed subgroups that declined in size as the migratory distance from their original continent grew. As the decrease affected the genetic diversity of the groups, even present-day populations exhibit this pattern: The further the distance from Africa, the smaller the genetic diversity. Interestingly, Galor demonstrates a hump-shaped pattern for the distance from Africa and corresponding ones for various measures of economic prosperity, deducing an ideal level of genetic diversity for a population's

economic success. According to the author, the optimum level is one balanced on the positive and negative effects of diversity. Greater diversity maximises the possibility of innovators by comprising a larger pool of individual traits and rationales, yet it also fosters reduced social cohesion and trust, making it harder for a population to thrive and develop. While the economic prosperity of a nation can be explained by a balance in genetic diversity, argues Galor, the less-optimal composition can be mediated by policies designed to tackle the specific issues rising from the extent of genetic diversity in a nation.

Galor draws from many different fields including history, economics, and the social sciences to build a holistic picture of the world. The strategy becomes a coherent book with a wide reach of topics but somewhat limited detail and substance in its claims.

'It was [Malthus'] pessimistic predictions about the future of humanity that turned out to be utterly mistaken', writes Galor (pp. 27–28). When it comes to eluding both past and future issues facing our species, Galor seems openly optimistic in his references to the 'incredible power of human innovation' (chapter 6). He briefly explores mitigation by fertility decline and new ways of adaptation springing from further investments in human capital as positive forces that have the potential to offset climate change and allow the human species to thrive while evading the seemingly inevitable choice between seeking further economic growth and preserving our planet. Yet the issue remains: Is it possible to keep growing eternally? What, if anything, can be done to address the inevitable headaches of exponential growth? Was Malthus' pessimism warranted after all? While scientifically sound and well-argued optimism in the matter is likely welcomed by most readers, in the absence of specific policies it does appear alarming. As humans we have great potential for

overcoming issues, especially when they allow us time to adapt. However, there's no promise that any future issues will do that, and while a one-size fits all policy answer is unlikely to exist, without determined, focused, and prompt action human innovation has no chance against climate change or other future problems. Galor does offer a few general ideas for the policy implications of his work, but he does not go into much detail in offering concrete tools to counter the root-of-it-all issues he proposes. On a general level, gender equality, education, and public health are identified as routes to improved human capital, which reads as the source of much of Galor's optimism. By providing all people the living conditions, nutrition, and education needed to foster human capital, we can make use of the variety of competencies and skills that precede future progress for the human race.

Behind the ambitious goal of constructing a comprehensive framework spanning the lifetime of humanity lies an even bigger one: popularising science. The idea that this book can be a gateway opus into the scientific sphere, while possibly excessive, might not be fully misguided. The book, starting even with its structure and layer-by-layer-explanations, is generally welcoming and accessible to a wide audience. Galor largely succeeds in expressing his ideas exactly and factually while avoiding overly complicated terms, phrases, and reasoning. Where he talks in terms of scientific concepts, he deciphers them with easily understood and simplified explanations without losing too much informative power. Even though his focus remains on the big picture, throughout the book Galor offers descriptive examples, similes, metaphors, and short stories to illustrate his ideas. Whether bringing up the effect of the Black Death on population size or demonstrating the differences between periods by telling the stories of three fictional families, the author relies on mostly

well-known and approachable analogies in the hope of conveying his message to a larger audience. Fundamental theories and authors, especially in the field of economics, are introduced throughout the book, and the requirements of prior knowledge to enjoy the book are minimal. In some parts of the book, this does result in language that bears a resemblance to that of a university textbook, but the content remains beyond that.

When it comes to the factual knowledge and the arguments explored in the book, more scholarly readers might take notes to dig deeper through other venues, but they should still find the book informative. In sum, this book is likely to provide insight into how to communicate complex scientific ideas accessibly and to enable science to reach a larger audience.

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Juliana Bidadanure: *Justice Across Ages: Treating Young and Old as Equals*

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Intergenerational justice has become a topic of great empirical and policy concern in ageing societies [Vanhuyse 2013, 2014]. In this book, Juliana Bidadanure adds to this literature by building a theory of justice across ages by combining the ideas of complete life equality, lifespan prudence, and relational egalitarianism. The argument that inequalities between ages do not matter as long they are compatible with lifespan equality is used here as a sparring partner for a theory of justice that argues why unequal or differential treatment between ages matters and under what circumstances it is justified or even prudent. The first four chapters contain the building

blocks for Bidadanure's theory, and the last three chapters apply the principles to different policy proposals. The introduction outlines the main elements of her theory. The first element, birth cohort equality, only looks at equality over the complete lifespan. The second element, lifespan prudence, posits that there is a case for distributing resources over the life course in a way that is sufficient at all ages, is efficient, and allows for differential treatment of age groups. The third element, relational egalitarianism, goes beyond distribution and posits that people should be able to relate to each other as equals, free of domination, regardless of their age.

Chapter one starts by defining age as a social category and how it performs in the context of discrimination compared to race and gender. The main difference is the temporal nature of age. Unlike race and gender, people do not stay at the same age. Age discrimination could therefore be temporary and potentially compatible with equal treatment over time. The bigger part of the chapter then deals with the difference between 'complete lives' and 'simultaneous segments' egalitarianism, the theoretical background behind the complete lives approach, and the connection to luck egalitarianism. Lastly, Bidadanure highlights the importance of picking the appropriate currency for egalitarian theories.

Chapter two presents Norman Daniels' 'prudential lifespan approach' (PLA). According to Daniels' PLA, inequalities between ages are justified when they are not in conflict with complete lives equality, and when they have positive effects for everyone. This PLA works with the assumption that age inequalities are only residual interpersonal inequalities and with the assumption that planners make decisions behind a veil of ignorance. In the remainder of the chapter, Bidadanure draws two main principles out of the PLA and entertains some objections to it. First, the principle of lifespan sufficiency, which dictates two

thresholds. The absolute threshold is an 'appeal to basic human needs and freedom from deprivation', and the second threshold is 'set at the level of what counts as a reasonable array of plans for a given age group in a given society at a given time' (p. 60). Second, lifespan efficiency posits that resources and opportunities should be provided in a way that improves 'diachronic utility' (p. 63). This means that resources and opportunities can yield a greater return over the lifetime when they are available earlier rather than later. Finally, Bidadanure shows that this PLA can be criticised on the grounds of lifespan inequality, demographic change, anti-paternalism, and intersectional inequalities.

In chapter three, Bidadanure engages in more detail with Dennis McKerlie's 'simultaneous segments egalitarianism' (SSE) that argues 'that temporal segments have significance in and of themselves for distributive purposes' (p. 89). She argues that this approach has an arbitrariness problem, as it is not clear how big the relevant time segments are. Bidadanure then posits that relational egalitarianism is the better approach to explain why inequalities between age groups can be problematic, as they can also carry their own moral weight. This approach deals with the relationships between people and asks the question whether they can stand as equals regardless of age. One obstacle to that goal is formed by stark hierarchies or other synchronic relational inequalities. In chapter four, Bidadanure summarises the principles of her theory, and then highlights some potential internal conflicts. The chapter also tests some examples on the three principles – for example, environmental risks like climate change can affect birth cohort equality as the consequences will grow worse over time. Lastly, Bidadanure outlines what her principles mean in the sense of treating the young as equals. In the case of lifespan efficiency, she points towards pre-distributive poli-

cies, such as investments into children and young adults.

In chapter five Bidadanure discusses a youth guarantee to address the labour market vulnerability of young people and prevent scarring effects, especially in relation to lifespan efficiency. She further discusses the idea of mandatory retirement, which is largely based on a conception of the labour market as a zero-sum game, and concludes that it is both imprudent and morally questionable. Bidadanure also poses the question whether a youth guarantee can be reinterpreted as a duty to work and warns that this idea is based on an erroneous conception of reciprocity and that it ignores important non-market care and social work. Lastly, she addresses the problem of ageism and shows the difficulties involved in defining demeaning treatment. Chapter six discusses Universal Basic Income (UBI) and Basic Capital (BC), a lump-sum grant. Bidadanure argues that while UBI is better equipped for sufficiency, BC can have advantages in efficiency. BC might have some advantages in terms of reducing lifespan inequalities, but UBI is better suited to address inequality between birth cohorts. Furthermore, UBI has advantages in terms of synchronic relational equality, by offering (young) people an exit option out of relationships of domination. To harness the benefits from both, Bidadanure offers a hybrid solution that combines the two.

In her last chapter, Bidadanure exercises the example of youth quotas. Referring to the de-jure and de-facto exclusion of youth from political power, she argues that including more young politicians, increasing experiential diversity, could widen the policy options in party platforms. Furthermore, this descriptive presentation of youth could 'increase innovation in problem solving' and lead to 'fiercer advocacy' (p. 221). Finally, Bidadanure argues that the underrepresentation of youth undermines their status as political equals and

can act as a repellent to their political participation.

Bidadanure does excellent theoretical work; however, there are some points worthy of further discussion. The first one is the distinction between choice, referring to the individual's deliberate decisions, and circumstance. According to Bidadanure, it is this clear moral separation in luck egalitarianism that leads proponents of that theory to be potential advocates of complete lives equality. Equalising resources at any given time would violate the most important principle of luck egalitarianism, which is that only those inequalities that are based on luck, and are not your responsibility, need to be corrected. Luck egalitarianism would therefore not be compatible with simultaneous segments egalitarianism. While Bidadanure accurately argues that choice and circumstances are morally separated in luck egalitarianism, it remains unclear in her egalitarian theory, how one should separate the two, and furthermore, how to treat either. However, Bidadanure does not ignore the problem. Rather, she acknowledges the difficulties, but does not come to a clear conclusion. This becomes evident in several examples.

The first example is that of low voter turnouts in the younger age groups. In the beginning of her book, she lists several examples that justify the exploration of age inequalities as a relevant issue. The lower youth voter turnout sticks out as the only one that uses active language: 'young adults typically vote at much lower rates' (p. 2). Later, she argues that this can be due to a 'disenchantment with politics' (p. 35), adopting a more passive tone. We now see that the responsibility for this situation is not as clear as first assumed. Finally, as part of the defence of youth quotas, Bidadanure argues that lower youth voter turnout can also be caused by obstacles stemming from their more frequent relocation, but also stigmatisation, suppression of information, and lack of democratic ed-

education. We can see, therefore, that for actions such as voting, the distinction between choice and circumstance is not so clear. And yet, this distinction has to play a role in every theory of justice.

A second example is represented by the discussions around longevity groups, paternalism, as well as Universal Basic Income and Basic Capital. As not everyone has the chance of living a full life of normal length, there are some people who will die younger and miss out on the benefits that are distributed, according to lifespan sufficiency, towards the end of the lifespan. One response to this could be to distribute much more to the younger ages, potentially increasing lifespan efficiency. This is also presented as one of the main advantages of Basic Capital over UBI. Bidadanure is sceptical of this solution for several reasons. First, not everybody will use the larger share of resources in a wise way, incurring the risk of aggravating existing inequalities. Second, how do we deal with those who have lost their resources and are now at risk of falling below one or two of the thresholds outlined in her principle of lifespan sufficiency? Clearly, we cannot let them starve. At least, that is the answer given in *Justice Across Ages*, and with it, Bidadanure distances her theory from basic luck egalitarianism. These examples, however, do not give us a good idea as to how we should treat personal responsibility and choice. Bidadanure then offers one additional distinction, separating circumstances into accidental or social causes, but unfortunately does not explain this in any detail. The problem with all these distinctions is how to find a clear moral distinction, but beyond that there is also a major epistemic challenge: How do you collect and understand that much data to know how a particular action came to be? Bidadanure wisely decided not to choose the easy way out and equate actions with choice, but she also cannot bring us much closer to solving this conundrum.

A promising point, however, in Bidadanure's account is the inclusion of the intersectionality of social risks. She argues that her focus on age-group justice can also address matters of justice along other social categories such as gender, race, and class. While the vulnerabilities of an age group can be spread very unevenly across that age group, policies of sufficiency can be helpful, because 'aged-based vulnerabilities threaten sufficiency for groups who are socially disadvantaged' (p. 80). Policies of efficiency, such as free education and financial support for all students, can also prevent the clustering of disadvantages. Following Bidadanure's logic, one could then image that policies to reduce class inequalities, such as more progressive tax systems, collective bargaining agreements, and generous unemployment benefits can alleviate the challenges of lifespan sufficiency. Bidadanure's account could profit from including this reversed perspective more clearly. Note also that the scope of the analysis matters more than the author seems to acknowledge. Frequently corroborated conclusions about elderly age-group bias in public policy, while true on their own, are actually reverted once private transfers of cash and time by families are taken into account. Welfare states are lifecycle redistribution machines: they redistribute much more between age groups than between status groups [Vanhuyse et al. 2021]. More specifically, we live in pro-elderly welfare states, embedded within *child-oriented* societies [Gal, Vanhuyse and Vargha 2018].

Of special relevance for concerns of public policy also is Bidadanure's principle of lifespan efficiency. Her application of this principle to public policy leads to recommendations of public investments in early childhood and of policies addressing the labour market vulnerabilities of younger adults, such as education, training, and employment. Taking into account also her endorsement of guaranteed-income poli-

cies, this policy package shares very much resembles that featured in different works by the Danish sociologist Esping-Andersen. As a response to the advent of new social risks and to promote a sustainability society, Esping-Andersen [2002] proposed a combination of social investment policies such as labour market activation, lifelong learning, child benefits, free day care, and income guarantees. Both accounts share the goal of efficiency, increasing future returns and preventing social exclusion.

In sum, in *Justice Across Ages* Juliana Bidadanure offers a very detailed and thorough account of age-group justice and its implications for public policy. Her theoretical account, already presented in earlier work, is now much more refined and rigorous. The strength in her account lies also in its encompassing nature, addressing both age-group and cohort justice, in offering a robust egalitarian take on age inequalities, and in its openness to intersectional concerns related to other important social categories such as race, class, and gender. Her account could still benefit, however, from a clearer stance on the question of individual responsibility and a further elaboration of intersectionality.

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Katie Martin: *Evolving Education: Shifting to a Learner-Centered Paradigm*
San Diego, CA, 2021: IMPress, 197 pp.

'As much as we want grades to reflect what students know and do, they often communicate what teachers value and how well students can comply with those rules' (p. 90). The above quote highlights what this book is about: changing teaching from being school-oriented to learner-oriented. The author emphasises that it is time to create a new normal to pursue learner-oriented teaching by building a fundament on connection, flexibility, purpose, agency, relationships, and authentic learning. For our author this is how the future of education should be, as it helps the education system to evolve, rather than remain stagnant. Changing the system to become more learner-oriented, the author claims, will help students to develop the skills that empower them to grow, solve problems, and learn. When they have these skills, students can proceed to study any subject and to learn and solve problems on their own, as these skills are fundamental for everyone and for every course a student may study.

The book is divided into three sections, each of which has a question as its heading. This question is answered through different chapters, each of which challenges us to continually ask ourselves to redefine what success looks like in the education system. The author asks us to adopt a broader understanding of the term success and how

to apply this in practice. We are challenged to reflect upon ways to redesign classrooms and the entire school system and to start focusing on improving the lives of students by including new technologies, learning sciences, and pedagogy, the aim being to centre the focus on learners and away from grading.

In the introduction, the author sets out three overall questions for educators who want to practice learner-oriented teaching. These questions are for the readers, to take with us as we read, and function as the framework the book is built upon. The first part gives us an insight into what it means to place students in a holistic context and explains why it is important to create a new normal instead of adhering to standard practices. This is done with exercises that show how the educator is able to get to know each learner and how this influences their ability to learn. The author provides examples from her own family to show what it means in practice and to emphasise how changing the perspective towards being more holistic will improve each learner's ability to learn and solve problems. This change in perspective results in a change in perception of what a learner should be like, so that each one is treated as unique instead of being placed in a standard framework. She therefore encourages teachers to make their students take responsibility for their own learning as this makes the students curious about themselves too. The author highlights the importance of making students aware of their own skills and of the competences they gain in class in order to give them a deeper understanding of how these skills and competences can be put into practice in almost every course and subject. What is also essential is the value of the relationships that students have with others outside the classroom. This point also emphasises the importance of believing in the students both inside the classroom and outside the classroom.

The second part explores key elements of learner-oriented education and provides real-life examples of empowered learning, personalised learning, competency-based learning, and authentic learning. The focus in these examples is not on major changes but on the changing small habits and routines, such as the questions teachers ask students and how the learning environment influences students along the way. This section explores the field of teachers empowering their students to investigate different pathways and find their best way of learning any subject. The teaching therefore does not start with the subject or the content of the course but rather with focusing on each learner and the way in which they learn best to ensure they feel successful in the course. The author argues that this does not have to be a major shift and shows how this approach will help to attain the results that are expected from the outside. The students are thereby encouraged to move at their own pace and to change their own perception about learning.

The last section challenges us, as readers, on how we can change our mindset. As teachers are often influenced by demands and expectations from the outside, the author gives examples of ways of making more systematic and widespread changes. As mentioned, this is not about major shifts but is rather about the small steps that can be made inside the classroom that will change the education and school system. The chapters in this section encourage teachers to make their students design a plan of how they can reach the goals that are set with the knowledge they have. This section builds upon the preceding ones, taking the knowledge and practices from empowering students to get them to take responsibility for their own learning in a way that suits them. Thus, the students also become the experts on the plan that should be designed for them so that they can reach their goals and are therefore not

placed in a standardised context. The teacher is thus not the centre of the learning process but is someone who facilitates and helps the students evolve during a course as they study a subject by continually giving them feedback and asking the necessary questions.

The book guides its reader towards taking the steps necessary to change education to make it adopt a more learner-oriented paradigm. It continually asks questions to encourage our curiosity and ensure we understand why this is an important change and what can be done about it as a teacher. Likewise, it also shows that this process is not a linear road and changing the education system means focusing on more than one thing. Hence, it gives us the impression how much more we should consider inside the classroom than only the content of the subject. Moreover, the book also asks whether the way the education system is built today is perhaps not beneficial for students, as it may not be improving the skills and competences students are expected to have. The current system does not create an environment in which teachers look at each individual and how they learn in their own, meaningful way. Admittedly, changing mindsets and how educators approach this may be difficult, as it also requires a change of behaviour and beliefs on the part of teachers. However, the book raises several questions that are presented in a respectful, honest, and direct manner, while emphasising how changing one's own perception will help the students teachers teach. Each chapter ends with questions that readers can answer and little boxes in which to write in the answers. This small but very efficient tool helps readers to reflect on a higher level about how to change their mindset to become more learner-oriented and thereby also put this into practice themselves. If readers of this book start to change their mindset, their behaviour may change, too, and thereby also their teaching. This is

done in a simple way, where the three parts are arranged to make readers more curious about the what, how, and why. The book also contains several real-life examples of the responses that may occur during the changes and how changing will benefit students and ultimately also the education system. Thus, it is not only a theoretical book but also a practical book to which everyone who works in teaching should turn. The book is not a finish line, nor does it offer just one solution; however, it provides deep insight into what a learner-oriented education system is, why it is essential, and how it can be applied in practice. Readers are encouraged to start with themselves and then expand into the classroom in order to make the changes in the system. It encourages readers to centre learning around the students rather than around the teachers' rules, and thereby expand the students' learning outcome. The book provides several arguments as to why the education system should be made more learner-oriented and encourage teachers and other educators to apply the learner-oriented practices inside the classroom. It also encourages readers, if they are teachers, to reflect on the questions they ask themselves before they start teaching, as this will change the way teachers teach. In this way the education system will be changed one step at a time.

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Bryn Rosenfeld: *The Autocratic Middle Class. How State Dependency Reduces the Demand for Democracy*

Princeton, NJ, 2021: Princeton University Press, 296 pp.

Broadly speaking, assessments of post-communist transitions have ranged between pessimism [Offe 2004], cautious realism

[Vanhuyse 2006], Euro-optimism [Vachudova 2005], bad longer-term governance [Vanhuyse and Perek-Bialas 2021], and shocking post-2008 'backsliding' [Makarychev 2021]. A common theme in this sinuous debate has been the lack of a specific social structure that could buttress a putative virtuous political and economic teleology. Yet, while scholars seemingly agree that 'enlarging the middle class' is needed to reconcile the tensions between democratisation and market transition, comparatively little has been said about scope conditions and concrete causal mechanisms. Picking up the gauntlet, Bryn Rosenfeld argues that the 'middle class' is neither as homogenous as previously thought, nor as unequivocally democratising as predicted (pp. 3–4). Drawing on both quantitative and qualitative data, Rosenfeld dissects how various strategies for expanding the middle class result in socio-economic groups with vastly different preferences for democratisation (pp. 3–6). Essentially, the author argues that dependency on public employment is the key driver of the middle class's preference for or against democracy. In an interdisciplinary fashion that brings together sociology, anthropology, and political science, Rosenfeld's book challenges many of the 'canonical approaches to democratization' (pp. 5–8) across the post-communist world.

To begin with, in order to bypass conventional normative views on 'the middle class as a carrier of democracy', the author adopts a sociological definition wherein 'human and social capital' delineate between an educated and professionalised social stratum and manual laborers (p. 7). On a basic level, this allows a more finely tuned analysis that distinguishes between 'the middle classes of the state', a typical modernisation vector adopted by autocratic regimes, and 'the entrepreneurial middle class', the existence of which is seen as the hallmark of democratisation in Western-centric studies (p. 6). This opens up space

to argue that understanding the means for attaining and maintaining 'middle class' social status is crucial to understanding support for democracy. The crux of the issue is that while buying off low-skilled labour might be cheaper for winning an election, fostering a dependent middle class, while more costly, greatly enhances regime stability (pp. 44–47). As such, because authoritarian regimes often resort to the targeted allocation of resources (jobs, salaries, benefits, etc.), people with high educational qualifications may support the regime as a means for upward mobility and/or status maintenance (pp. 37–38). The latter is particularly relevant when we consider that democratisation and market-regime transition typically entail retrenchment and job insecurity (pp. 48–50) [see also Appel and Orenstein 2018].

While higher levels of education might provide a cushion in the form of options for exiting into the private sector, the author shows that authoritarian regimes can provide middle-class constituencies not just with better material incentives but also with prestige and social mobility ladders (pp. 49–51). Because the latter are especially important for regime stability as well as securing elections, Rosenfeld mobilises a diverse range of data: survey data on public opinion (most notably the Life in Transition Survey conducted by the European Bank for Reconstruction and Development), post-election protest data, in-depth surveys on career trajectories, and in-depth field research (pp. 29–32). The geographical scope is equally impressive, as the author seeks to understand developments in both the well-known CEE transitions (including former Yugoslavia), the somewhat less explored Central-Asian cases, and also the dissolution of the USSR. The wide comparison and the varied types of data allow the author not just to better test the causal strength of the argument outside the North-Western 'core', but also to dialogue with a wide range of literatures per-

taining to modernisation, democratisation, and catch-up development.

As mentioned above, the book's first key contribution is that it shows how disaggregating the umbrella term 'middle class' yields vastly different results. Similarly, since democracy requires both clear support for democratic institutions and an entrenched belief that the type of regime matters (p. 72), Rosenfeld argues that regime preference, support for the status quo, and support for a particular incumbent all need to be analysed contingently, and not as inherently overlapping, which is what most studies do (p. 67). In this line of thought, in post-communist authoritarian regimes the 'state middle class is less democratic than the private-sector middle class' (p. 67). While the 'middle class' may in general be more supportive of democracy than the working class is (p. 78), a key qualification to this in post-communist countries is a person's type of employment. In fact, public sector employees appear to be 25% more likely to support authoritarianism than the private-sector middle class (p. 83). This becomes clearer still when we control for even stricter definitions of democracy (p. 83), but this higher support cannot be completely explained by the private-sector middle class's negative economic experience during the transition (p. 94). By gradually comparing explanations such as communist socialisation or differences between discrete state jobs, the author carefully shows that the autocrats possess enough discretionary incentives from their control of public employment to discourage the state middle class from supporting democratisation (p. 97). The author provides further indirect support for this argument by showing that in democratic transitions there is no correlation between state employment and support for democracy, despite the fact that the legacies of socialisation and educational attainment are similar (pp. 67, 98–110).

A second key contribution of the book

is that it dilutes the entrenched consensus in the literature regarding the middle class's participation in protests (p. 103). Although Rosenfeld does not directly dialogue with the established literature on pacification [Vanhuyse 2004, 2006], he unearths how, much in the way CEE democracies in the 1990s diluted the working class's disruptive potential, there is a direct correlation between how dependent the middle class is on the state and its likelihood of participating in mass protests (p. 103). To the well-known factors of the positive and negative inducements for the middle class to support the status quo, the author adds that differences in social capital are also key for explaining middle-class patterns of protest (p. 106). In order to cement such a nuanced argument, to which end survey data are perhaps least effective (p. 111), Rosenfeld temporarily abandons the comparative angle and analyses Russian protest data between 2011 and 2013. On one level, the argument is clearly substantiated by the obvious gap regarding participation – private-sector employment increased the likelihood of people participating in protest twice as much as state employment (pp. 114, 119). This in turn suggests that if the overall growth of the middle class that is captured by macro-level economic data is the result of autocrats' opening up state employment, the likelihood of protests is much lower, given that the expanded part of the middle class emerged out of these jobs (p. 120). In the Russian case this seems backed up by the reality that 'had the middle class participated in protest at the same rate as the private sector middle class', the overall scale of the protests would have been much larger (pp. 120–121). On a more advanced level, above and beyond incentives and coercion, the highly specified nature of social capital also dampens the disruptive potential of the state-employed middle class. Particularly among the higher echelons of the bureaucracy and/or among people

who have been employed by the state for a longer period of time, the exit options for public-sector employees seem to have declined, which in turn reduced the likelihood of protest (p. 125). This explains why 'cognitive mobilization is not uniformly the consequence of rising affluence, education and specialization', leading in turn to the conclusion that the growth of the middle class does not ipso facto lead to democratic protest (pp. 130–132).

Broadly speaking, Bryn Rosenfeld's book impresses through analytical clarity and a finely tuned analysis that sheds new light on a seemingly entrenched scholarly consensus regarding the middle class and democratisation. By carefully disentangling overlapping factors that usually influence political preferences and electoral behaviour, the author manages to highlight clear causal channels between state employment and authoritarian support or the lack thereof. While at times part of the argument is indirect, by drawing particularly from sociology, the author manages to add new layers to the political science literature on democratisation. In breaking down the umbrella concept of the 'middle class', the book sends out the strong message that, particularly in the tricky area of electoral behaviour, state dependency has different effects on discrete socio-economic groups.

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- Lýdia Grešáková, Zuzana Tabačková, Spolka (eds): *Mapping the In-Between. Interdisciplinary Methods for Envisioning Other Futures***
Košice 2020: Spolka, 144 pp.

Cities around the world are facing a problem regarding the question of how to revitalise previously developed land that is no longer being utilised. Places like brownfields and vast post-industrial factories seem to have no particular purpose, but what if they have a character of their own? With the problem of the revitalisation of previously developed lands comes the question of what revitalisation plan would best benefit the city's citizens and the landscape? Traditionally, a revitalisation plan is conducted by investors, property developers, and policymakers in the field of urban planning. Recently, however, the idea of involving citizens in participative planning has become popular.

This bilingual publication *Mapping the In-Between*, by a Slovak group of women architects, sociologists, and urbanists called Spolka, is a collective work by participants in the Never-Never summer school. All the

contributions are related to the participants' experience of one particular brownfield in the city of Košice. The brownfield around Hornád River is in danger of insensitive redevelopment and revitalisation: developers plan to build luxury apartments there, get rid of the greenery, and build, for instance, a parking lot instead. Using diverse experimental methods, the authors mapped the land around Hornád River, which seemed to be empty and desolate, only to find that a network of relations and activities already exists there. Since brownfields, as we will see, have a character of their own, these networks should be the starting point for future planning, instead of planning from a blank slate. Such planning, the authors argue, should also be based on participative methods of rethinking the space, in which we can all draw on our daily experience of the city and its environs.

Mapping the In-Between is composed of various types of texts, ranging from academic articles and essays to poems and collages. The book's authors also come from a variety of backgrounds, such as architecture, geography, sociology, and the arts. The diverse styles and backgrounds offer a variety of methods and ways in which to envision a utopian future of the place studied. Interdisciplinarity is one of the main pillars of the collective since, as the authors argue, we should look at planning through a different lens than that of architects and urbanists – 'virtually anyone can have a say, as we all have knowledge of the city through our daily interactions with it' (p. 11). In the end, it is primarily us, ordinary people, who will live there.

The authors enter the debate on current urban development, a debate that is centred on the trend of constant growth and progress. Brownfields seemingly provide an opportunity for a new start; they are traditionally viewed as *tabula rasa*, on which planners can conceive a new vision. The authors argue, however, that brown-

fields are not blank slates as existing nets of relations and activities are intrinsic to them. The authors thus envision a utopia where planning is a sensitive and caring process, both towards the citizens and the land. They take a stand against the centralistic, rationalistic, and modernistic way of planning 'from above' and against the neoliberal urge to demolish the old, build the new, and profit from it. Brownfields are, instead, envisioned in the book as "overlooked spaces that can often be the emotive or the irrational that fill the gaps between rational structures and lines of cities" (p. 62). It is important to preserve the remains of such places that are not touched by rationalistic planning because they offer something more – something unusual, certain emotions, a wilderness, a piece of nature – in cities full of predictability and rationality, where people lose touch with nature. They are a 'strip of unorganized green landscape and abandoned objects that are gradually taken over by nature' (p. 13). So far we have been remaking nature according to our image for our exploitative purposes. Now we have come to a critical point where we need to rethink our interconnected relationship with nature.

Another important aspect of the book is the emphasis on participative methods of planning aimed at 'testing not just being within the site, but also being with each other and learning from one another' (p. 11). The authors participate both with each other and with their surroundings. In contrast to the usual way of experiencing the world through the eyes, the whole body becomes an instrument of experiencing, discovering, and mapping the brownfield. They participate with the dwellers (the unhoused people) and objects (the garbage, plants, soil, or small community gardens) that already exist there. Using different methods of participation, they show how we can make contact with nature in the Anthropocene age. We have

been taught that human-made culture and nature are two different worlds, but this book shows how we can use our whole body to get in touch with our surroundings. We can read, for example, how to practise deep listening and soundwalks (in the chapter 'Listen to In-Between'), or how to treat garbage as archaeological material (in the chapter 'Memories of an Antique Future'). Participation becomes a process of mapping a place and getting to know it.

The revitalisation of brownfields has become an issue widely discussed even among lay people living in cities. Many cities have to consider managing their brownfields and how to use them. The topic of brownfields moreover has not yet been thoroughly mapped and studied. Brownfields are often seen as places waiting to be revitalised, instead of places with a character of their own. Recently, however, many urbanists and architects have become interested in this overlooked subject, and Spolka shows how even brownfields can have their own *genius loci*, soul, and purpose. The book is perfect for those interested in the topics of landscapes and brownfields and their present and future. It provides inspiration by showing how we can learn from each other's experiences and different approaches as architects and urbanists (who bring their own point of view), sociologists (who put an emphasis on the social context), and artists (who tend to be more imaginative).

The quality of the texts fluctuates rather widely. Since every text has a different form, it is difficult to evaluate the book as a whole. Some texts are clear and compelling, while others are ambiguous, experimental, and vague, which sometimes makes it challenging to understand the point being made – like, for example, the chapter 'Spatial Intimacy – Mapping as a Performative Action'. But overall, the book meets its set goals, because it is most importantly a dialogue with and criticism of modernist planning. It sketches out op-

tions for collaborative work and utopian thinking very well. After all, the publication is the outcome of a summer school programme and the participants' work, so we cannot expect it to cover every possible aspect of brownfields – there are different books for that. *Mapping the In-Between* provides a novel and original look at the issues of brownfields, their revitalisation, and planning as a participative process.

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Levy del Aguila Marchena: *Communism, Political Power, and Personal Freedom in Marx: Beyond the Dualism of Realism*
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This book takes the view that communism culminated because of a historical process and that Marxist communism is not just about the historical conditions in which social reproduction occurred and radical changes to those conditions, but it is also about the freedom of humans to control production after abandoning the alienated terms of their previous reproduction. Although the book can be criticised, it is important because it reflects on three approaches: the philosophy of history, political economy and political conceptions, and the anthropological basis of political power and personal freedom.

The author explains that, on the one hand, Marxian theory has been in decline since the early 1980s; on the other hand, it has remained valid in some regions of the world – for example, in North American political economy and in European discussions of communism and its perspectives. Latin America had continuous political conflict about the antagonisms of political life and the antagonisms of citizenship. The

book reflects on the critique of capitalist society that continues to be made by politicians, different sectors of the public, social movements, and academia. It also highlights the shift in the economical paradigm that occurred during the 1998 and 2008 financial crises, and how this shift contributed to a better way of organising the economy and better ways for people to live their lives. The gap in this discourse is the omission of communism in African countries. For example, in South Africa, a specific type of communism has represented an important ideology since the elimination of Apartheid and its racist and unequal laws and policies and it has contributed to a more equal society.

The five chapters in this book discuss their topics within the context of Marx's communism and beyond Marx's communist ideology and concepts. Core conceptual questions are discussed, and one chapter critically analyses historical conditions and communism and its negations and reconciling praxis. Perspectives on the abandoning of political power by Marx are presented in the chapter about being against the free state, continuing harmony, and the modern convergences against political power. Other chapters discuss how to manage the life of the common within the politics of communism, how to reread Marxism, and how to rethink communism.

The chapter with the most sub-sections and sub-themes is the one on Marx and the abandonment of political power, and it addresses Marx's utopianism. It builds on the discourse of social reality in Germany, France, and England and juxtaposes Germany's political reality of lagging freedom with France and England, which experienced more of it. The author problematises the 'free personality' within 'a communist society' without the need for a 'political dimension' (p. 11). One of the conceptual presumptions, argued by the author, is that when the modes of production and capitalism collapse, the political

domination that was attached to it changes as well. The flipside of the collapse, moreover, is that the state will disappear with the public life that is fractured. Thus, a new natural and spontaneous social life emerges for all social actors without political interference. Marchena lastly also judges the political economy and philosophical anthropology of Marx's voids as '(a) the will of free and (mutually) different individuals and (b) the conditions of their economic reproduction, respectively, in a communist society. As for the third of these voids, regarding (c) the political conditions for the management of a life in common characteristic of communist society' (p. 144).

Marchena points to the need to outline the key dialectic in communism between the needs and capacities of humans and the development of humans, referring to this phenomenon as the communist enterprise. The author contextualises the phenomenon of Marxian dialectics between freedom and necessity as the dualism of realms. From a liberal point of view, the author argues that power is a necessary evil rather than a positive determination for collective freedom as well as individual and communal freedom. An important phenomenon, for the author, is the dialectics between the human capacities of the common and their needs in terms of their history. Moreover, the author disregards the 'exercise of power that concerns life in common when (a) we think the human achievements and, more fundamentally, when (b) we address the inescapable relationship between the particular and the common Marxian criticism' (p. 217).

In the chapter on communism beyond Marx, there is an interesting question about communist politicity and about deploying communist politicity as a method for an emancipated human praxis. Marchena argues that there should not be any form of social domination over the means of production and private property. Marchena further argues that positive guidelines can

be found in Marx on how social life is organised, especially in reference to communist politicity, countering the void of politics in Marxian communism. Marchena concludes that the analysis is not an attempt to 'make Marx say what he didn't say' (p. 13).

Although the book includes interesting and relevant insights, I have a few concerns about some of the topics. The philosophical, anthropological, and political economy perspectives reflect and analyse key narratives but, on the other hand, pay limited attention to the problems surrounding contemporary reflections on politics as an emancipatory method for a communist society. However, Marchena identifies very important tools and methods for achieving an emancipated society within capitalism, where social actors have the best political resources 'inscribe[d] on its banners: From each according to his [capacities], to each according to his needs!' (p. 14).

Another key question for me is the restriction on achieving individual freedom. The author points out that 'Marx agrees with the liberals in that politics can only be a necessary evil, it can be appreciated in the proposal of a dictatorship of the proletariat—considered necessary due to the remnants of the class struggle – that would lead to the self-cancellation of political power' (p. 15). But the scope of the crisis, especially the sociological crisis, is not discussed.

In sum, this book makes valuable contributions to the discussion of personal freedom within the context of communism and political power. The book should be made available to policymakers and researchers in various countries with interests in Marxist ideology, capitalism, neoliberalism, and the economy.

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Vera Szabari (ed.): *(Disz)kontinuitások. A magyar szociológia 1960 és 2010 közt. ((Dis)continuities. Hungarian Sociology between 1960 and 2010)*

Budapest 2020: Napvilág Kiadó – ELTE Eötvös Kiadó, 328 pp.

This volume is a premiere in the history of sociology in Hungary. Departing from the essayistic and fragmentary approach of their predecessors, the studies collected in this volume excel in rigorous documentation and subtle analysis. Focusing on the decades between 1960 and 2010, the studies cover a period that includes the hesitant restart of sociological research and its institutionalisation (with its counterpart beginning of university education in the field the 1970s) up to the redefinition of its tasks after the change of regime in 1990. This history, interspersed with crises due to the control of the communist regime, appears as a process of continuities and discontinuities. In fact, this characteristic defines the entire history of sociology in Hungary, which, after a spectacular beginning and evolution in the first two decades of the last century, under the guidance of Oszkár Jászi, was brutally annihilated by the conservative regime that came to power in the fall of 1919. Its representatives were forced to emigrate or abandon their previous scholarly interests. Even the notable attempts to research reality through the sociographic method in the 1930s did not lead to the consolidation of sociology. After the Second World War, the establishment of a department of sociology constituted a real hope for institutionalisation, but in the context of the Communist Party's fierce struggle for power, the prospects of the social sciences were gloomy. In 1950, the head of the department, Sándor Szalai, was imprisoned, the department was closed, and sociology was erased as a discipline from the academic field.

The process of Hungarian sociology's re-establishment starting in the 1960s is an-

analysed in depth by Vera Szabari. This ambivalent process is also illustrated through an analysis of several fields and branches of research consolidated over these decades. Research areas and themes that aroused the interest of the majority of sociologists throughout the period of the communist regime included prejudices (Judít Gárdos), values (Judít Gárdos and SÁgvári Bence), Roma issues (Róza Vajda), social structures, stratification, and mobility (Vera Szabari), the way of life (Timea Tibori), the Hungarian family (Erzsébet Takács), the concept of the informal (András Vigvári), the problem of poverty (Ibolya Czibere), and the formation of elites (Luca Kristof, Vera Szabari). An important merit of the chapters in this book is that they follow the evolution of these research topics after 1989 and assess the influence that research methods had after 1990.

Compared to the black-and-white view characteristic of the first years of freedom, when certain authors denounced 'socialist' sociology as enslaved to the regime, this volume adopts a more nuanced position. The chapters' authors demonstrate that the methods, ideas, and results of the discipline practised under the communist regime constitute an important and inspiring heritage for the post-communist period as well. Even a cursory review of new research results indicates that, despite political regime changes, there are many elements of continuity in subject matter, methodology, and interpretation.

The authors refute the superficial opinion that Hungarian sociology (as a matter of fact, Eastern European sociology in general) is nothing more than a 'mechanical' copy of Western sociology. It is true that, for ideological and political reasons, tutelary forums obstructed the resumption of earlier traditions. Under these conditions, Hungarian sociologists borrowed empirical methods from Western sociology. However, this did not mean that they unthinkingly adopted Western sociological agen-

das. Instead, they adapted these to Hungarian social issues. Taking over and creatively adapting the methods to Hungarian research increased its international visibility. Of course, the context of the beginning and that of the development of sociology were not and could not be entirely favourable owing to the dogmatic Marxism of some party ideologues.

However, after a decade of excommunication, even the communist regime allowed the social sciences to be re-established, owing to a desire to put an end to its international isolation. The process was difficult because even in the ruling party after 1956 there was no unity of opinion about the reinstitutionalisation of sociology. This influenced both the choice of research topics, the recourse to traditions, and the selection of future researchers. Despite this situation, which varied from one stage to the next, this book shows that the research and interpretation of social phenomena rarely ended up in apologetic work. The relationship between sociologists and power was permanently ambivalent, which sometimes resulted in administrative sanctions, as happened in the case of the first director, András Hegedüs, in 1968, and in the case of Iván Szelényi and György Konrád five years later. On the other hand, it must be emphasised that the Kádár regime did not want to close down the channels of communication with sociologists, and it therefore accepted even work that did not glorify socialist politics and its social consequences (in contrast with some neighbouring Eastern European sociologists).

The chapter authors distinctly emphasise a comparative analysis of Western and Hungarian (Eastern European) models, in order to identify the theoretical and methodological contributions specific to the region. And because they also address the period of transition to post-communism in the analysis of some continuities, they also inquire into the content of some categories:

would the meaning of the concept of poverty, for example, from the 1970s be similar to that of the 2000s? As well as these questions, the methods and ideas that 'survived' the regime change and have yielded results in our contemporary world raise the question of whether there is a significant difference today between Western and Hungarian sociology.

This book does not just deal with the inventory of the main directions of sociology over a span of more than fifty years, it also reflects on the functions and nature of the history of sociology. Compared to the old and often ahistorical practice of interpreting canonical theories, the contributors to this volume proceed to a perspective that considers sociology as a quintessentially

historical phenomenon. Thus, the task of the history of sociology, according to this conception, is to identify the alternatives of social research in the given historical political context and specific frameworks for interpreting the results of the empirical investigation. In sum, this volume is not the finish line of a project, but a challenge to broaden it. Important research topics, such as urban sociology, rural sociology, sociology of mass media, and sociology of youth, remain uncovered or underexplored, as do comparative studies with Eastern European sociologists who had similar aims in this half century.

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Ranking objective

and perceived inequality

Ranking objective and perceived inequality. A comparison of the Czech Republic in the European context

A comparison of the Czech Republic
in the European context

Jiří Večerník a Martina Mysíková

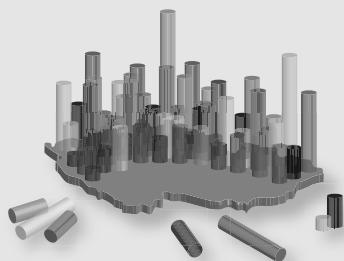
Jiří V

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Ranking objective and perceived inequality

A comparison of the Czech Republic
in the European context

Jiří Večerník and Martina Mysíková



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In Czech public and professional discourse there is strong rhetoric about the rooted egalitarianism of Czech society and its extremely low socio-economic inequality. This study thus traces various objective and subjective dimensions of inequality in an attempt to examine the validity of this rhetoric. The study uses various sources of data on the levels and trends in earnings, household income, and living conditions in the Czech Republic and compares them to other European countries. It appears that although the country ranks among societies with a low level of social inequality, Czechs are not particularly 'exceptional' when it comes to objective economic equality, nor are they remarkably egalitarian in their attitudes.

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