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RURAL ANTICIPATION OF THE WELFARE STATE IN THE CZECH REPUBLIC

Abstract

Although empirical findings show the deterioration of living standards in post-communist countries in the 1990s, there are significant differences in public opinion about the "welfare state" project in countries where more rigorous liberal reforms were implemented and countries with much slower progress towards the liberal model of capitalism. The Czech Republic with its economic development is still on the symbolic crossroads of deciding how to approach the welfare state. There is a very widely discussed model of an "active approach" (non-state subjects) to social policy with a residual role of the state. The model should have a chance of a more effective implementation in (small) rural communities where social problems can be better identified and resolved. Questions should be raised about the potential of social policy actors to participate in the process and the approach to social policy models in rural communities. How can the opinion of actors be evaluated in the process of making a new system of social policy, which still remains a "reform from above"? This paper follows a preceding qualitative study by the author with a quantitative survey of public opinion on the participation and responsibility in social policy creation and acceptance of the welfare state model based on the liberal model of capitalism. The first part provides a review of international studies on rural poverty in post-socialist states. The main part of the paper presents results of a quantitative investigation in one Czech rural community where significant social problems of the welfare state project (unemployment, illness, education, age, living conditions) have been studied.

Keywords: welfare state, globalisation, rural poverty, social policy

INTRODUCTION

Analysts have been considering the welfare state crisis in late modernity – causes, forms and possible solutions – for more than twenty years, and there-

fore, welfare state theorists speak about the last stage of welfare state development – reconstruction of the welfare state. Looking at theories, we can identify two basic processes: individualisation and generalisation. The modern individualisation process (Beck in: Keller, 1996) can be interpreted as the disintegration of assurance and as a consequence of the needs, finding and realising a “new assurance” for the individual. Thus, individuals have to make an effort to integrate into the largely institutionalised and impersonal structure of large social systems. Indeed, the welfare state is an institution which can offer mechanisms bringing “new assurance” to individuals. On the other hand, individuals are also involved in the generalisation process when they use impersonal (welfare state) institutions (Konopásek, 1998).

Both processes are parallel and synergetic – individuals claim to live as they wish and want to live in a “coherent world”. The great extent of abstract systems of the modern welfare state project tends to social relations proceeding from the local context (Giddens, 1998). The degree of the abstract character of the welfare state institutions is closely related to their chance of existing more abstractly in the specific local context.

When considering the relation of an individual to welfare state institutions, a basic approach in comparing social groups and measuring variability between them is poverty. After the collapse of communism researchers started to study so-called “new” poverty.

Eyal, Szelényi and Townsley (Eyal, Szelényi and Townsley, 2000) approach the reflections of transition suggested in the transition process in the frame of the neoclassical economic theory and the neo-institutionalist path dependency (Stark, 1996) using their concept of trajectory adjustment. They even initiate a new sociological paradigm – neoclassical sociology – to reformulate the basic theorist’s question to identify the “preconditions of capitalist transformation” to “how these various conditions shape and diversify in the actually existing capitalist system”, and argue that the formation of classes is consequential for the type of capitalist system influenced by circumstances – place and time.

During the transformation in post-communist countries significant changes in social policy occurred (especially increasing NGO activities). Concerning social policy at that time, the most important post-communist government decision was which welfare state model could be acceptable and then realised: the existing (although in authoritative form) “redistributive model” retaining the dominant role of the state, but also responsibility and enormous cost for social policy or “residual model”, which would be radically reoriented social state policy into non-state social policy with a dominant role of the civil sector (non-profit and non-governmental) in the market economy or “corporative model”, which is based on partnership between the state and civil sector.

The decision has to respect public legitimacy to realise a successful project. The alternative assumes harmony between the individual's actions and the welfare state model and individuals will strengthen the model through their action.

GLOBALISATION AND RURAL POVERTY – WELFARE STATE INTERVENTION

The societal transformation from a socialist centrally planned to a post-socialist market economy, can theoretically be considered as a cultural change with structural and economic consequences.¹ Nowadays when we focus more on perspectives of rural societies in late modernity, we have to discuss processes of reshaping rurality. Regarding this aim conceptual disputations involved in selected texts of Europe's Green Ring (Bruckmeier, Kopytina 2001; Granberg, Kovách, Tovey 2001) on post-traditional and post-modern rurality referred to the sociological question of the socio-cultural subject in post-socialist rural development as an inspirational framework for highlighting gathered data analysed in the empirical chapter of this paper.

The authors (Bruckmeier, Kopytina 2001) understand "post-traditional" rurality as a result of modernisation associated with permanent changes in rural society traditions and with "consuming" rural areas and "colonising" them by different social groups, not only rural resources users. Referring to post-traditional rurality

¹ Poverty can be interpreted as a mass post-socialist phenomenon, which induces state intervention – primary source of globalisation into the rural world. The most extensive and up-to-date socio-economic survey concerning the poverty problem in Eastern Europe after the communist era, "miserable time" for any empirical research regarding poverty in the time of transition to the market economy, was provided by Ivan Szelényi (Emigh, Szelényi 2001; Szelényi et al. 2001). Szelényi's team gathered empirical data in selected post-communist countries – Bulgaria, Hungary, Poland, Romania and Slovakia – to compare poverty evolution and formation of the underclass. Analysing empirical data showed increasing poverty in all East European countries and questioned the formation process of the underclass. There are (in texts analysing and interpreting the situation in European post-socialist countries) several concrete conclusions explaining poverty, measured by absolute poverty, in each selected country. Poverty in Slovakia as in Czechia, measured by absolute poverty, declined in the first stage of transformation, but the declining process was reversed (Večerník, 1998). The most endangered group as regards poverty is the same in Slovakia and in the Czech Republic (Radičová in Emigh, Szelényi, 2001; Večerník, 1998): families with two children and only one full-time employed parent, uneducated people, graduates aged under 25. Absolute poverty measured and analysed in post-communist countries consists of two important aspects – one is quantitative (how poor people are), the other is qualitative (features of poor people – age, gender, race etc.) Another dimension covering these two aspects is relative poverty (how poor people feel). The reflection poverty of poor consists of their absolute poverty and relative poverty reflected through the mass media and the "aggregate picture" gives them a perspective of being poor or not so poor in the contemporary welfare state.

they speak about the emerging process of “de-traditionalisation”. Kovách views de-traditionalisation as a cultural component of “de-peasantation” and argues that “de-peasantation” is not an isolated structural change, but the process strongly influences cultural transformation into post-socialist images in late modernity, and because of having to be surveyed as a multidimensional process (analysed from various sociological angles – for example, the way of transmitting knowledge). There are (Granberg, Kovách, Tovey, 2001) three levels for analysing the process – cultural, structural and societal. The societal level is most important for this paper, also including the transformation of rural community life.

The empirical part of this paper concerns the process of de-traditionalisation in Czech rural areas in post-communist times, understanding as a melting-pot newcomers and “rooting” locals, and emblematically also outsiders who have an influence on rural community life. All these actors have a different social status, social, cultural and economic roots, interests and respect for the community, ideas about re-shaping the rural community, creating new local images and are, as Kovách stresses (Kováč, 2001) in competition with development resources and strengthening their class position in rural society.

I examine Bruckmeier and Kopytina’s hypothesis of the colonisation of rural areas, which will be investigated at empirical level only focusing on any aspects influencing rural community by other social structures.

I analyse the process of de-traditionalisation in the frame of the welfare state in Czech rural areas, focusing on the co-operation between the networked actors living in and outside the rural community with regard to their participation in social policy decision-making. In this paper the frame of the welfare state is reduced to one rural community; however, the basic claim for the welfare state is to reduce poverty as far as possible with the assumption of the effective welfare state (Potůček, 1995). The process of globalisation shapes not only the redistribution of privileges, poverty, power and many others, but it also contributes to the global re-stratification characterised by the polarisation of poverty. Global poverty has two basic features – reducing the problem of hunger and localised poverty (while wealth is globalised and its impact is not as real as in the localities) (Bauman, 2000).

Theoretical “futurological” aiming at the ideal type of de-traditionalised rural society is likely to develop into the “new” (internationalised) welfare state characterised by the co-operating actors networked in the policy arenas and other networked actors (“pluralised rurality”).

GLOBAL AND RURAL NETWORKS – THE CZECH CASE

The social policy project is mostly understood and analysed at national level, although the basic principles – especially subsidiarity and participation are em-

phased as key principles for an effective welfare state reducing mass poverty. If we would like to know whether and how these principles are realised, i.e. how they are reflected by welfare state clients, we have to investigate this at local/rural level.

The purpose of my investigation was to explore images emerging in the community, reflections of the welfare state realised in the post-communist era. The Czech Republic and other post-communist countries have to reconstruct social policy from paternalistic state models into a post-modern welfare respecting market economy. The model of the welfare state can be re-shaped by public opinion, because governments design social policy with respect to economic, cultural and social circumstances. In the case of the Czech Republic a question arises whether it will rather follow the residual welfare state model respecting market economy or the "bountiful" welfare state depends on the degree of respect, solidarity and participation in particular localities. The enforcement of solidarity and subsidiarity in communities improves aiming at the less bountiful welfare state and in my case study I wanted to explore how the community realises participation and subsidiarity in the frame of social policy problems.

In 1997 I started the empirical work for my thesis and chose a Czech village settled by some Romany families to identify the basic principles of the local policy arena (actors, cooperative and competitive relations between them, local problems and their solutions). I needed to complete the picture of local policy making in the village through local public opinion.

Table 1

Responsibility cluster no. 1 (N=69)

	Per cent	Valid per cent	Cumulative per cent
Valid abandoned	49,3	51,5	51,5
traditional	30,4	31,8	83,3
welfare oriented	15,9	16,7	100,0
total	95,7	100,0	
Missing system	4,3		
Total	100,0		

Note: Table category "abandoned" involved people who answered that they had not rendered social services for any of six selected problems. The second category, "traditional" had rendered only social services which used to be provided in traditional communities (taking care of the elderly) and the third category, "welfare oriented" included people who are "open", accept rendering services for all six selected social problems (not only "traditional").

I divided the analysis provided by the SPSS programme into three sections. The first section focuses on analysing public opinion regarding responsibility for solving six selected social problems. The question is whether people differ significantly in their expectations to the actors' responsibility in particular problems or not. I have used K – means cluster analysis to classify people with different attitudes into groups. Three groups emerged (see table no. 1) differentiated by their approach to solving problems – the first can be called “abandoned”, represented by over half the respondents, because they are strictly against any responsibility for social problems, the second group involved people refusing any responsibility with the exception of responsibility for providing services for the elderly.

The first group is represented by older (over 50), less educated, deeply rooted people (who were born and have always lived in the community). The third group are welfare-oriented people, include well educated, young (under 35) people, and is typical of most of the newcomers. The second, traditionalist group are mostly women who moved from outside the community and are not specified by age or education.

The second part of the analysis examined the task of the respondent's approach to the responsibility of local policy makers. While the first part classifies concern on their responsibility to problems, the second puts emphasis on the actors participating in problem solving. Then, the question to be analysed is whether there are significant differences between the evaluation of particular people participating in policy making or not.² Considering the distance of actors to the community we can distinguish three groups arising from the cluster analysis (see table no. 2).

The biggest group covering approximately half of the respondents can be characterised by their approach to social policy as people who approved the “redistributive welfare state model”, because the majority of them claimed strong responsibility of all actors, regardless of whether they were local or not. The second group included respondents with a tendency to support the “residual welfare state model”. Results of the analysis (clustering) examined the opinion of respondents (representatives of the corporative model) through their social distance to the community, supported their inclination to the corporative welfare state model, although not as effectively as it should theoretically be. Actors (local and intermediate) are not expected to be responsible for solving social problems (with the exception of providing health services).

² As in the first section, K – means cluster analysis and involves three levels of distance to the community: 1. locals – closest related people (relatives and neighbours), 2. intermediate actors – mostly living in the community, who were identified in former qualitative investigation as important in local policy making (e.g.: the mayor, local doctor, teachers etc.), and 3. outsiders (regional officers responsible for education and other problems, employment office).

Table 2

Responsibility cluster No. 2 (N=69)

		Per cent	Valid per cent	Cumulative per cent
Valid	residual WS	36,2	36,2	36,2
	redistributive WS	47,8	47,8	84,1
	corporative WS	15,9	15,9	100,0
Total		100,0	100,0	

Note: Table category labels were inspired by the Esping-Andersson division of welfare state models: residual, redistributive and corporative. Respondents' attitudes to resolving social problems grouped them into three groups: 1. residual welfare state model representatives included respondents who put strong emphasis on individuals, 2. redistributive model representatives included respondents who put minimum emphasis on individual responsibility and strong responsibility of state institutions and 3. corporative welfare state model representatives have not put emphasis on individuals, nor on the state institutions responsibility.

Although basic identifiable features of each of the three groups are not distinct, we can find a few differences. In the last group where respondents supported the corporative welfare state model, the characteristics of age, education and gender are clearest. There is strong support of less educated women and this is the "oldest" group. The group of the residual and redistributive model have two levels of education among respondents – polarised between less educated and highly educated respondents. While the residual model is more supported by older men, the redistributive model is characterised by the youngest respondents, deeply rooted into the community and more represented by women than men.

The third part of processing used data about the local policy makers' willingness to help solve problems. I examined the degree of help to people living in the community. The three computed networks correspond to the distance of actors to the community, local, intermediate and outsiders' network, we can answer the question about the degree of networked actors into each level of network and then answer how strongly globalised the community is. If we assume that the community is not globalised, the dominant category in the local network will include strongly networked actors and be represented by occasional and non-related actors. Results for the examined community have not brought clear evidence about strong globalisation. The "potential" group is intermediate, because the comparison to the local and outsider network has fewer representatives among non-networking actors. At national level, rural inhabitants in the Czech Republic are relatively open to be globalised, and follow patterns disseminated by the mass media, especially TV (Majerová, 2001).

Three stages of analysis measured the level of community globalisation through the approach of respondents to being active, participating in the social policy project and contributing to the welfare state.³

Regarding the results of the first and second analyses, there is an assumption that welfare state oriented actors and those who do not support the redistributive model of welfare state are prepared for social policy models which are dependent on the state. The independence of the community is proved by the positive results of the third stage of analysis. The positive result means networked local and intermediate actors into the community are as strong as possible.

In the case of Libštát we can say that the community is not globalised, because the representation of welfare orientated people (16.7%) is minimal and people supporting the redistributive welfare state model is widest (47.8%). Actors who have a chance of changing the rate of community non-flexibility to the globalised processes should be highly educated, young rural newcomers. The subsidiarity principle (analysed in the third part) is not mature in the community. The "potential" group are intermediate actors who are willing (more than four fifths) to participate in solving social policy problems regardless of whether they are successful or not. Because the local people (relatives and neighbours) and outsiders (regional officers and other regional organisations) are not strong networked intermediate actors they have greater potential to realise their "local social policy", they have an open way to contribute to the welfare state and to strengthen the community against globalisation.

Local social policy is mostly provided through active policy. As opposed to passive social policy (when people are in the role of "passive clients" of the welfare state, they sit and wait for help from a state institution) some actors are ready to help themselves or other people (members of family or community) to solve their social problems. This attitude corresponds to the endogenous rural development. Both approaches – active in social policy and endogenous in rural development – are characterised by the chance for rural inhabitants to make decisions about the rural community and the life of its members. The necessity of this chance is prompted in the Czech Republic by the fact that the rural population does not trust the policy created outside the countryside, in the cities (Hudečková, Lošťák, 1995).

³ The first section divided respondents into three groups (abandoned, traditional and welfare state oriented) by their attitudes to social policy problems – whether they are ready to participate in resolving social problems or not. The second group division (residual, redistributive and corporative welfare state) classified members of the community by their willingness to respect the general social policy model designed by the state and fit their action: participate in the social problems resolving and be responsible for themselves and people living in the community. The last one analyses the first and second section, because it does not involve the potential of social policy actors living in the community, but also looks at the community members as actors who participate in resolving community problems.

CONCLUSION

Nowadays analysis and theoretical disputations about the countryside and life in rural communities have to respect great social change to post-traditional rural society, which is pluralised in activities, norms, attitudes etc. probably far more than in the past. Differences emerged not only between rural communities with regard to the social, political and economic disparities, but also within the community. The first dissimilarity can be determined by the way of implementing social policy. Beck (Beck in Giddens, 2001) has offered to emerging “sub-policies”, i.e. transition of globalised policy making it closer to the human, that means decentralisation from government to local level where particular problems are solved with specific instruments suitable to the local circumstances. But this means finding a new (localised) policy suitable to post-traditional rural society and to the transitional post-communist countries. The key question is how? Can it be the “third way” designed by Giddens (Giddens, 2001)? If so, despite the diversity of political and other conditions in Western countries, we should be able to distinguish five basic principles. Let me summarise them and compare them with results of the Czech case study:

1. **The decentralisation process** has to take place. In social policy emphasis is put on the subsidiarity principle, which is still weak in the Czech case. Generally decentralisation from government to lower administrative levels is taking place. The Libštát case evidences the “quasi-subsidiarity” principle – most individuals are unwilling to be responsible for themselves, but active intermediate actors are willing to participate in solving social problems, although their activities are rarely accepted. The fact that they are often newcomers to the rural community can be important.

2. **Public sphere renewal** – should be characterised by transparent actions which are controversial in rural communities, because if members of a community are under strong social control and on the other hand there is more open space for privileged relations with specific connotations the community becomes more flexible in solving problems.

3. Improved **efficiency in the functioning of administration** and direct democracy mechanism are claims easier realised in the rural community. There is a chance for intermediate actors to be active in the frame of local social policy, but the question is how to carry out these mechanisms (e.g. a referendum about particular local problems, public hearing – some emerged in Libštát)

4. The expectation for local government is to **reduce risks for members of the community**, not only risks related with social policy problems. In the rural community I have identified two disharmonised processes – the willingness of intermediate actors to participate in resolving social policy problems and the resist-

ance of a group of people who can be characterised as less educated, traditional and deeply rooted people.

5. **Dual democracy** is the key assumption for efficiency in social policy in the rural community (the policy realised by the welfare state with respect to the community), because of the great importance of the principles of civil society.

In all five principles of the "third way" to the effective welfare state there emerged classifying social policy actors if they are active or passive in their participation in solving social problems. The "third way" and active/passive actors have to be observed against the background of globalisation which can be seen from different points of view: globalisation can be understood as hope as well as destruction – that depends on the social actors' point of view and puts stress on different consequences. The interpretation of the globalisation process is affected by actors' roles, their positions and activities (Lošťák, 1998).

The survey in the Czech village brings to light the motive power for providing local social policies by the group of intermediate actors. Nowadays, action in rural communities is determined by the "traditional force" of people not oriented to the welfare state. Civil society is for active intermediate actors a challenge to realise their activities and strengthen their social position in the community and also to strengthen their orientation to the corporative or residual welfare state model and reduce the power of the group of people supporting the redistributive model of the welfare state rebuilt on the communist heritage.

The majority of poor people do not have the energy to participate through civil society mechanisms in the re-shaping of social policy, although they know this could be a way of reducing their poverty. This fact can prompt the activity of intermediate actors in the rural community. The paradox is that the resistance of traditional rural community members against their activities, i.e. resistance towards educated newcomers willing to participate in rural life and active social policy, does not make the rural community more able to fight globalisation processes.

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