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ŁÓDZKIE TOWARZYSTWO NAUKOWE
90-505 Łódź, ul. M. Skłodowskiej-Curie 11
tel. (42) 665-54-59; fax: (42) 665-54-64
Sprzedaż wydawnictw: (42) 66-55-448, http://sklep.ltn.lodz.pl
http://www.ltn.lodz.pl e-mail: biuro@ltn.lodz.pl

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The common theme of the texts included in this issue of Przegląd Socjologiczny (Sociological Review) is the relationship between cultural and political aspects of ever-changing capitalism, with a particular focus on the tensions between the economy and democracy. The development of capitalism in the 21st century has been marked by the growing problem of social inequality, the normalisation of financial collapses and radical individualisation. The increasing wealth of a global minority, deteriorating living conditions in the peripheries, and growing political uncertainty result in conflicts and social instabilities. The interrelationships of technology and economy have intensified, and the common understandings of success and security are constantly changing. On the one hand, market actors urge for the liberation of communication and for the freedom of contracting. On the other hand, market economies foster instrumental rationality and strategic communication. Fraud and deception may be beneficial as long as they remain concealed. From this viewpoint, market economies contribute to the dissolution of normative order, a problem that is accompanied by the instability of the financial system. At the same time, new and fragile forms of sociality appear.

The contributors of this issue discuss these problems through different theoretical lenses and examine various social phenomena. In the first article Mariusz Baranowski attempts to present the welfare sociology approach to the problems and dilemmas of modern developed capitalist societies; the concept of welfare is used by the author to analyse changes in the structure of social differentiation, as well as in social relationships, educational opportunities, political attitudes, patterns of consumption and leisure etc. The authors of the second paper (Patricia Pfeil, Udo Dengel, and Marion Müller) take us through different cultural conditions and examine how the re-formation of the German middle class has been caused by the perception of social and individual crises (in their example over-indebtedness) and the uncertainty associated with it. The third text by Maciej D. Kryszczuk and Michał Wenzel traces the intellectual sources of Neo-Luddism, a revived form of protest against capitalistic technological

development and the existing social order. It proposes a typology, and examines its relevance for studying contemporary work. Akin to this, Renata Dopierała refers to minimalism as another example of refusal of capitalistic behaviour that consists of anti-consumer-oriented social practices. Elżbieta Nieroba discusses the changing role of non-capitalistic cultural institutions under new circumstances by analysing how museums have had to change and implement new practices and tools as a result of changing audiences and their expectations. The last paper, Maria Wieruszewska's essay, illustrates the tensions between the market economy and the democratic culture with reference to the challenges faced by Polish villages under the new political and economic system after 1989.

As two additions to the articles we offer: a review essay by Paulina Matera and Rafał Matera entitled 'The four horsemen of the Apocalypse' in which the authors present their remarks on the book *The great leveler. Violence and the history of inequality from the Stone Age to the twenty-first century* by Walter Scheidel (2017); and a review by Barbara Markowska of Jacek Tittenbrun's book: *Neither capital nor class. A critical analysis of Pierre Bourdieu's theoretical framework* (2017).

ARTICLES

MARIUSZ BARANOWSKI*
Adam Mickiewicz University in Poznań
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WELFARE SOCIOLOGY IN OUR TIMES. HOW SOCIAL, POLITICAL, AND ECONOMIC UNCERTAINTIES SHAPE CONTEMPORARY SOCIETIES

Abstract

This article attempts to present the welfare sociology approach to the problems and dilemmas of modern developed capitalist societies. In addition to describing areas of interest in welfare sociology, primarily welfare economics and positive psychology, the focus will be on the characteristics of the condition of modern societies. For this purpose, the term 'uncertainty', which is well suited for characterizing the various dimensions of post-modern societies, will be used. Nevertheless, one should keep in mind that this concept has not reached the creditable sociological elaboration (except for the work of economists on precarious forms of employment). As sociologically defined, welfare will be used for analyzing changes in the structure of social differentiation, as well as in social relationships, educational opportunities, political attitudes, patterns of consumption and leisure, to name a few. All these changes reflect not only the impact of globalization on social security systems, but also the consequences of the technological revolution and demographic challenges on subjectively perceived social welfare.

* Dr, Institute of Sociology; e-mail: mariusz.baranowski@amu.edu.pl

Keywords: welfare sociology; capitalist society; uncertainty; social justice; precariat; antisocial institutional changes

INTRODUCTION

Welfare sociology does not constitute a separate sub-discipline of sociology, which is all the more surprising when we take a closer look at the concept of welfare itself (sometimes substituted by terms such as well-being, happiness, health, quality of life etc.), which, among other things, designates the normative goals that societies aim to achieve. The understanding of welfare can differ substantially between different societies, but they are nonetheless "created" in the practice of social life, with its cultural patterns, division of social labour and/or the historical determinants of existing institutions. For example, taking for its object the study of need fulfilment from the perspective of economic processes, economics is also concerned with welfare, which is further explored by its sub-discipline called welfare economics. Psychology, undertaking a broad study of the foundations for and consequences of an individuals' actions, inadvertently ends up describing the subjective conditions for welfare (and the specifics of welfare and wellbeing – see: Taylor 2011: 777–794), particularly in the specialised field of positive psychology. In democratic countries the social sciences, apart from their main object of interest, which is power as an element of struggle for influence, explore a variety of other important social questions which have tangible emancipatory consequences for people who are in danger of institutional exclusion [cf. Marshall 2009; Renn 2008]. The common ground for the aforementioned fields where welfare can be studied, together with some which have not been mentioned (philosophy, cultural studies, law, and the field most commonly associated with the issue – social policy) should be sociology [cf. Gouldner 1968], as "sociological insights have served in a number of instances to improve the lot of groups of human beings by uncovering morally shocking conditions, clearing away collective illusions, or by showing that socially desired results could be obtained in more human fashion" [Berger 1963: 7]. In sociology, the focus has largely been placed on the diagnosis and attempts to solve burning social issues (sociology of social problems) associated with poverty, social exclusion, anomie, unemployment [Barbieri 2009], etc. Because of that, not enough attention has been paid to the issue of welfare – in particular its positive aspect. This does not mean building a one-sided vision of a society based on the issue of welfare, which has many years ago been labelled "lyrical sociology" (Jan Strzelecki,

Kozyr-Kowalski) and which takes for its subject the beneficial aspects of social "development" and focuses on positive achievements. An interest in those areas which are avoided by researchers from other fields is a well-known trait of the sociological approach. Because these burning social problems and issues have been taken up, measurable results have been achieved in the form of advanced studies of these phenomena; studies which, when properly recognised and named, become easier to transform in the desirable way. The sociology of welfare, building on existing achievements and considering the interdisciplinary character of welfare itself, should be at the heart of studies of social reality, concerning both the material conditions and the psychological sphere (e.g. affluenza [de Graaf, Wann, Naylor 2005]).

WELFARE AS A KEY CONCEPT

Efforts made by social sciences, humanities (e.g. philosophy) or practical doctrines (e.g. law) are aimed at carefully considering the theoretical conditions and practical consequences of certain modes of human existence. *Arete*, a concept undertaken by ancient thinkers, for example in the context of combining goodness and beauty as marks of the ideal type of social upbringing (*kalos kagathos*), was by no means the first example of such considerations. Both the mental exertions and practical attempts at implementing a given social utopia had welfare at their foundations. This term could be understood in a variety of ways, sometimes as happiness, or justice, sometimes as quality of life [cf. Diener, Suh 1997].

In his book, "A Theory of Justice" [1999 (1971)], John Rawls proposed the broadly discussed concept of "justice as fairness", but he also pointed out the social determinants of any concept of justice. He wrote directly about "fundamental social problems, in particular those of coordination, efficiency, and stability" [1999: 5], which designate the conditions for attaining welfare understood as a common good. The last book by Guy Standing [2017], which discusses the basic income proposal, also very clearly refers to the rule of social justice as a reference point for judging the various elements of contemporary social policies. Some of the individual practices of social welfare are tested using component concepts of social justice, such as "the security difference principle, the paternalism test principle, the rights-not-charity principle", as well as "the ecological constraint principle and the dignified work principle" [2017].

Quality of life, which is an object of interest for many disciplines and subdisciplines of science, can be paraphrased, in Zygmunt Bauman's sociology, as the right to a good life [Bauman 2011]. This is not limited to the material means

of life, ways of spending free time, type of work and relations with friends and family, but also includes the quality of the natural environment and civic engagement (political and quasi-political activity) [cf. Blackshaw 2016; Caruana 2007]. Consumption is not an unimportant phenomenon here, as it has been playing a major role in developed societies since the beginning of industrial capitalism [Baudrillard 1998 (1970)]. It not only influences the quality of life, but also the subjective feeling of happiness, which is perhaps best manifested by the relative income hypothesis by James S. Duesenberry, in which attention is called to the role of external effects in consumption, which have to do with interrelations between households. As a result, the fulfilment of needs is linked to the demonstration effect, because individual people compare their own consumption to the consumption level of their family, friends, and neighbours [cf. Veenhoven 2008]. This means that subjective welfare is created within a certain social context, defined by comparisons to the so-called significant others (which in turn contradicts the concept of *homo oeconomicus*).

Some thinkers claim that "[t]he starting-point for defining well-being in current debate is often followed by a departure from the overall happiness or life satisfaction in a population. This is a consequence of a shift of focus within psychology and sociology away from historical accounts of exploring well-being that primarily involved the study of illness and dysfunctionality" [Bengtsson 2015: 21].

Problems already appear on the level of linguistic specification of the term welfare, because some differentiate between "personal well-being and collective welfare" [Max-Neef 1995: 115], while others talk about "subjective well-being" and "social welfare, i.e., human happiness", or of "human welfare" [Ball, Chernova 2008: 500] or "individual welfare" [Graham, Felton 2005].

Manfred Max-Neef [1995: 117] proposed a "Threshold Hypothesis, stating that: for every society there seems to be a period in which economic growth (as conventionally measured) brings about an improvement in the quality of life, but only up to a point – the threshold point – beyond which, if there is more economic growth, the quality of life may begin to deteriorate". This hypothesis expresses the intuitions of how subjective well-being is connected to a more measurable notion of welfare in classic conceptualisations. This should be taken into consideration, as it is impossible to abstract oneself from individual mechanisms of assessing one's own life (which is also dependent on the quality of life of other individuals or broader social categories).

For example, a critique of economic studies of welfare "emphasized that income standards are useless in societies where non-monetary services and benefits to a very large degree contribute to the welfare of the individual. Social indicat-

ing is inadequate because it is based on clearly visible and directly measurable phenomena only. It cannot examine inequalities and deprivation stemming from the division of welfare and unequal access to the distributional welfare systems. (…) Living conditions analysis should not exclusively measure monetary incomes of individuals and families, but also their resources, material as non-material. Resources were to be seen as products of social relations of distribution. This involved the studies of resource distribution not only resulting from the operation of the mechanisms of the market, but also of the family, the community, and the state" [Henriksen 1987: 384].

A similar observation was made by Amartya Sen, who in *Development as Freedom* [2000 (1999)] described differences in subjectively-assessed happiness and objective living conditions that can be observed between different countries. The form of economic 'unfreedom', often in the form of extreme poverty, has played an important role in his work, as "economic unfreedom can breed social unfreedom, just as social or political unfreedom can also foster economic unfreedom" [2000: 8].

On the other hand, disputing the economic approach (e.g. Amartya Sen's), Louis Kaplow and Steven Shavell [2001: 282] claimed that "(…) any conceivable notion of social welfare that does not depend solely on individuals' utilities will sometimes require adoption of a policy that makes every person worse off." And, more importantly, "the tension between concern for individuals' well-being and conceptions of social welfare that give weight to factors apart from their well-being is sharper than may have been apparent; endorsement of any form of non-welfarist policy assessment implies that, in certain circumstances, it is socially desirable to make everyone worse off" [2001: 282].

The above fragment conveys the complicated relations between individual well-being and social welfare, which, when analysed from a particular perspective, becomes difficult to reconcile. The phenomenon of affluenza is a perfect example, because – as Amartya Sen also pointed out – the individual perspective of valuation is influenced by many factors. This is why in some surveys people living in developed economies in relatively comfortable conditions have declared a low-level of life satisfaction (and also material conditions, despite having several cars and a large house). It's worth noting that differences between developed countries and those where income per capita is low are not simply relative, but also absolute: "African Americans [in the United States – *M.B.*] have an "absolutely" lower chance of reaching mature ages than do people of many third world societies, such as China, or Sri Lanka, or parts of India (with different arrangements of health care, education, and community relations)" [Sen 2000: 6].

WHAT IS CERTAINLY CERTAIN IS UNCERTAINTY

Uncertainty constitutes an inseparable part of human life in the contemporary world, including in the enclaves of economic development. However, the nature of uncertainty has changed [Beck 1992], and its influence on societies has increased significantly in recent decades. According to Robert Castel, author of *La montée des incertitudes*, between the end of WW2 and the early 1970s, the vast majority of French citizens looked at their futures with enthusiasm, despite the situation being far from ideal, containing "strong inequalities, massive injustice, pockets of poverty, institutional violence and merciless relations of domination" [Castel 2016: 160]. Today, the situation is significantly different, as pessimistic attitudes towards the future dominate, including among the French. According to a French sociologist, "we had entered into a new, more aggressive economic dynamic, which intensified competition at the global level under the hegemony of international finance capital. This new regime of capitalism caught off guard, weakened and sometimes destroyed forms of social organization that had been established at the end of industrial capitalism" [Castel 2016: 161].

In his most recent work [2017], the above-mentioned Guy Standing adopted a broad understanding of inequality, which is not limited to the economic aspect, but also refers to inequality of security and – most importantly – feelings of certainty. Jens Zinn from the University of Melbourne characterised the phenomenon of uncertainty and linked it to expectations in the following way:

"Uncertainty is characterized by cognitive and emotional elements. Uncertainty indicates unclear, ambiguous, or contradictory cognitive constructions, which cause feelings of uncertainty. In sociology as well as economics, uncertainty is about expectations. It refers to the future and whether our expectations will be met and also to the present and our capacity to produce expectations. Typically, norms and institutions structure our expectations. They support clear and unambiguous notions and expectations even though they are always – to a certain degree – uncertain" [Zinn 2007: 5097].

The problem is that these norms and institutions Zinn writes about are undergoing increasingly rapid transformations in contemporary societies, causing a decline in the feeling of "ontological security". Anthony Giddens used the term "manufactured uncertainty" (or "manufactured risk") in order to emphasise the changes happening at all the levels of organisation of contemporary societies. The term itself, according to the British sociologist, "comes from human involvement in trying to change the course of history or alter the contours of nature. We can separate manufactured risk from external risk. External risk refers to sources

of uncertainty which come either from unmastered nature or from "unmastered history" – that is, history as lived by taken-for-granted traditions, customs and practices" [Giddens 1995: 2].

Uncertainty, though present on every level of societal development, becomes particularly visible during economic and social crises, because during such times the social changes happen at an increased pace and force existing institutions (understood after Douglass C. North very broadly as "the rules of the game in a society or, more formally, the humanly devised constraints that shape human interaction" [1990: 3]) to fall apart [Harvey 2014].

Alain Touraine [2014] made an important observation pertaining to the last economic crisis and differentiated between a crisis of a capitalist society and a crisis of capitalism itself, and underlined the weakness of the state and social-economic entities when faced with an offensive by large financial institutions and banks. Loïc Wacquant touches upon a similar subject in his works, pointing out that "castaway categories – unemployed youth left adrift, the beggars and the homeless, aimless nomads and drug addicts, postcolonial immigrants without documents or support – have become salient in public space, their presence undesirable and their doings intolerable, because they are the "living and threatening incarnation of the generalized social insecurity" produced by the erosion of stable and homogenous wage work (promoted to the rank of paradigm of employment during the decades of Fordist expansion in 1945–75) and by the decomposition of the solidarities of class and culture it underpinned within a clearly circumscribed national framework" [Wacquant 2009: 4]. This category was described by Immanuel Wallerstein [1999: 41] as "the dangerous classes", because "the point is that these populations have become volatile once again, and therefore dangerous once again from the point of view of the priviledged strata in the world-system" [1999: 45].

AREAS OF UNCERTAINTY AND ANTISOCIAL SOCIAL POLICY

August Comte, the father of sociology, wrote about the social dynamics' perspective, which became the foundation of sociology's contemporary approach to the challenges of social reality. This perspective draws our attention to the active and – using Bauman's term – "liquid" character of society. This means that social changes happen on multiple levels and are determined by such a high number of variables that it is difficult to control all of them, and thus to predict and actively modify them. From an individual's perspective, this causes a specific kind of uncertainty, because individual persons are not able to understand the

piling up of changes (structural, technological, environmental). As an example, let us consider the challenges faced by Scandinavian countries, which have the most advanced welfare state institutions [see Table 1].

TABLE 1. Challenging the Nordic welfare model

The Nordic welfare model's core values:		Evolving towards:
Universal coverage	>	Differentiation, individualization, need-based benefits, earned entitlements
Welfare based on citizenship	>	Economic citizenship, customer choice
Financing through taxation	>	Insurance, partial payment
Equal rights and status	>	Increased marginalization, social inheritance, economic citizenship
Equal opportunities and results	>	Increased marginalization, social inheritance, economic citizenship
Dominant role played by the state	>	Private, non-profit, voluntary sector, enterprises, civilian society
Decentralized services	>	Services based on entitlements, national standards
High-quality services	>	Uncertainty about what public welfare services will be provided, saving up
Generous benefits	>	Welfare contracts, saving up
High level of employment	>	Yes, but many working-age people outside the workforce

Source: Morgen 2007: 12.

It can be clearly seen that the changes that are happening on many levels, further strengthening the feeling of uncertainty rather than alleviating it. The characteristic quality of these changes is their departure from the vision of social policy as a universal civil right, towards conditionality, understood in various ways. Aid for those persons socially excluded or threatened by exclusion is being reduced in a number of ways, and welfare state institutions no longer aim at preventing dysfunction (preventive function) and instead offer interventions to the weakest groups (responsive function). The feeling of uncertainty that is a consequence of, for example, changes in the labour market, leads either to precarious forms of employment or other, even more serious, social problems (unemployment, poverty). In both cases, the consequences (psychological and social) are difficult to overcome, and when we take into account the antisocial character of social policy – most of them seem almost impossible to extract oneself from. The core of antisocial policy, as I understand it and as it affects the growing social uncertainty, is in setting goals and tasks that do not benefit the society as a whole

(e.g. through policies which differentiate individuals or certain social categories and discriminate against chosen, i.e. the weakest, parts of the society). This does not lead to collective behaviours which can bind a community or a society; but quite the opposite – it causes fracturing and sets people against one another. Let us take a look at an example of such antisocial changes within a welfare state, as pointed out by Susanne MacGregor:

"There is a general move away from the full employment goal towards activation policies – such as the use of unemployment benefits to ensure compulsory training or redeployment, combined with support for low-paid work. For example, in the United States there is TANF (transitional aid to needy families) and in the United Kingdom, child tax credits. These reforms are helping to create a layer of low-paid workers on the margins of the labour market, dependent for their living standards on the state benefits. A cultural shift accompanies these policies, with increased emphasis on personal responsibility (memorably encapsulated in the US Personal Responsibility and Work Opportunity Reconciliation Act 1996). Those included in the economy and society have to exercise responsibility to provide for themselves and their families. For the excluded, however, the policies are not so much neoliberal as neo-conservative or authoritarian, with more intervention by the state, and more intrusive policies and surveillance" [2005: 144].

There are many more examples of such antisocial solutions [Standing 2011, 2014; Baranowski 2017], which target sick or disabled people. It is important to bear in mind, however, that they all aggravate the feeling of uncertainty among those who need help and support the most (both individual and social). This does not mean that antisocial social policy means only the dismemberment of existing institutions, but it means, most importantly, a change in approach to major social issues and problems. Data from various countries does not necessarily indicate a decline in spending on social care (or social policy), but the form, assumptions and solutions that are employed can lead to stigmatization, humiliation, and increase the uncertainty of the subjects. This is what I mean by antisocial solutions that further separate those in most need from social welfare.

WELFARE SOCIOLOGY AND THE CHALLENGES OF TODAY

The proposal to employ the sociological perspective to look at welfare as broadly understood (i.e. encompassing both the subjective satisfaction/dissatisfaction with life and material conditions, as well as access to infrastructure and public institutions) is aimed to help create a perspective that would allow a deepened diagnosis of the contemporary determinants of this issue. The goal is to overcome

the barriers between the "interests" of various scientific disciplines and practical doctrines in order to design multifaceted solutions aimed at ensuring the highest possible level of welfare. This is possible, on one hand, through the use of a number of "standard" (though not trivial) methods: partial reforms of existing welfare state institutions; limiting the income and wealth disparity; change of consumer attitudes etc. On the other hand, given the demographic challenges (ageing societies), imperfections of labour markets (with precarious forms of employment), technological changes (automation), psychological determinants of dynamic social change (mental disorders and illnesses), and unequal access to high-level education, it is important to take a closer look at "radical", daring proposals of ensuring welfare, like unconditional basic income [Mulvale 2008] or job guarantees.

These proposals are founded on conceptualisations of welfare contradictory to the "standard" welfare state institutions (Baranowski 2013). Particularly in the case of a basic income guarantee, the need for emancipation of social categories threatened by exclusion (e.g. women, people with lower income or on benefits) is important, but in the context of unconditional support for every citizen (and in some proposals even every denizen). Keeping in mind the above-mentioned antisocial solutions regarding, *inter alia*, labour market relations, Erik Olin Wright replied to the question "What would society gain from the institution of an unconditional basic income?" as follows: "A generous, unconditional basic income which would allow employees a meaningful exit from a particular employment situation, or indeed from paid employment itself, directly transforms the dynamics of the employer-employee relationship in a private market economy" [2006: 6]. This, in turn, would result in social welfare, because it would broaden the scope of real – though not full – freedom of choice about one's fate. As Wright said: "(…) In a capitalism with basic income people are free to engage in non-market-oriented, socially productive activity. There is a wide range of activities which many people want to do but which are badly organized by either capitalist markets or public institutions" [2006: 6].

Basic income, as a proposal to solve the problem of statutory poverty by means of a cash benefit, goes beyond material needs as narrowly understood. It also entails a (partial) weakening of negative aspects of uncertainty, experienced especially in the context of the labour market and its correlates, as well as culturally impregnated practices of treatment of women, which can have a significant impact on the patterns of political participation. Therefore, the unified view of welfare proposed in this article fits perfectly well within the analysis of the basic income concept.

Guy Standing used the rules of social justice, in the understanding presented above [see also Standing 2017: 88–89], to assess the concept of a basic income guarantee against known social security solutions. The results of this summary are presented below (Table 2.).

TABLE 2. How different welfare schemes satisfy social justice principles.

	Security difference principle	Paternalism test principle	Rights-not-charity principle	Ecological constraint principle	Dignified work principle
minimum wage	X	V	V	—	—
Social insurance	X	V	V	—	—
Means testing	X	X	X	—	X
Subsidies, vouchers	X	X	X	—	—
Job guarantee	X	X	X	—	X
Workfare	X	X	X	—	X
Tax credits	X	X	X	—	X
Negative income tax	X	V	V	—	X
Charity	X	X	X	—	X
Basic income	V	V	V	V	V

Source: Standing 2017: 99.

This summary is by no means undisputable, because if we look at the job guarantee proposal [cf. Wisman, Reksten 2013] with respect to both the paternalism test and the rights-not-charity principle, the results are entirely different. Philip Harvey [2013: 13], criticised by Standing, stated very clearly that "the right to work is not accompanied by a duty to work in international human rights law" [see also Harvey 2005].

From the sociological perspective, the job guarantee proposal [Fullwiler 2013, Murray 2013, Wray 2013], created by economists, is ultimately designed to grant welfare to those who struggle on the job market. This is meant to secure a decent salary, as well as grant the psychosocial benefits of being around other people, being useful, etc. Studies of group redundancies (and also outplacement programs) provide a range of valuable data on loss of employment, which can only be compared to the death of somebody close or a divorce. It is true, as is claimed by the critics of the job guarantee proposal, that so-called 'bullshit jobs' do not constitute an alternative to more freedom-oriented and emancipatory solutions. But this does not automatically mean that the job guarantee

proposal itself would not have a positive impact on social welfare, because it does not include such jobs being created. It would be like rejecting the basic income guarantee by saying that the amount it would provide does not solve any problems of those who are excluded or threatened by exclusion (including the ability to engage oneself in "socially useful activities" that Guy Standing [2017] and Ladislau Dowbor [2014] wrote about). Furthermore, the experiences of the Dutch "Jeugdwerk garantiewet" (JWG programme) for young people, and the Argentinian "Plan Jefes y Jefas de Hogar" [Wray 2006] suggest that job guarantee programs are rather successful.

Within the sociological approach to welfare, one should naturally analyse the proposals, even the most progressive ones, which aim at improving the living conditions of members of the society, as well as identify the areas in which such welfare is being limited [e.g. Cichocki 2017]. In regard to the latter question, we need to be aware for example that the increase in unemployment is accompanied by an increase in a range of negative phenomena, like assault, robbery, rape or murder [Raphael, Winter-Ebmer 2001]. Indeed, the very approach to penalisation, which becomes a giant mechanism of exclusion, should not be neglected by researchers addressing the issue of welfare from the sociological perspective [Wacquant 2009]. In one report it was noted that "measures that affect the economic well-being of the community provide more potential leverage over crime than measures that influence the risk of arrest or the severity of the punishments imposed on offenders" [Wan et al. 2012: 17]. The need for studies like this (not only in regard to crime), as well as an innovative approach to the social determinants of the functioning of local communities (for a study on urban communities see Andy Merrifield [2014]) from the perspective of social welfare, should not be questioned. On every level of analysis, one can observe either functional or dysfunctional aspects of social change, and with the right analytical perspective we can name the changes that are happening and those that influence them (aiding the former and hindering the latter). The sociology of welfare should, on one hand, adhere to the idea of public sociology [Burawoy 2005], that is, an engaged discipline devoted to the good of a society as such, and on the other hand not be indifferent to the changes such as those identified, for example, by Andy Merrifield, who wrote about "a new kind of citizenship (…) an urban citizenship of workers without salaried work, of students without careers (the NINJA generation: »No Income, No Jobs and Assets«), of poor and middle-class people without homes, of retirees without pensions" [2014: 9].

CONCLUSIONS

As Norbert Elias pointed out, one of the dangers in sociology is "fragmenting into even more specialist sociologies – from the sociology of the family to the sociology of industrial organizations, from the sociology of knowledge to the sociology of social change, from the sociology of crime to the sociology of art and literature, from the sociology of sport to the sociology of language. Soon there will actually be specialists in all these fields, elaborating their own technical terms, theories and methods which will be inaccessible to non-specialists" [Elias 1978: 50]. Today these fears are certainly not unfounded, although one needs to take a look at the nature of the processes and phenomena in question in order to be able to make a responsible decision regarding the adopted methodological perspective, including an attempt to distinguish a certain sub-discipline. If the research conducted by sociologists [Therborn 2013], economists [Atkinson 2015, Piketty 2017, Stiglitz 2013], epidemiologists [Wilkinson and Picket 2009], and psychologists [Schütte et al. 2014] confirms growing socioeconomic inequalities with their multifaceted consequences, including in developed capitalist economies, then the issue of welfare, which inspires both theoretical and practical endeavours, should be reformulated. This means a re-thinking and re-formulation of overly narrow theoretical formulations because, as Anthony Atkinson [2015: 3] rightly noted – "Inequality is embedded in our social and economic structure, and a significant reduction requires us to examine all aspects of our society." And when we take into consideration the material and psychological determinants in areas such as not only health, employment, and security, but also sexuality, education, etc., the sociological perspective on welfare becomes even more important. This is all the more so because the increase in socioeconomic inequalities and uncertainty with respect to living conditions is accompanied by an increase in radicalisation, which strengthens the feeling of insecurity, in turn legitimizing the development of an apparatus of state violence in the name of the greater good. This in turn further limits civil rights, which only worsens the already tragic situation for the weakest social categories, who experience the antisocial character of the institutions of social policy. Not only do capitalist corporations exert pressure on their employees, but states also abuse "austerity governance" and "rule by accountancy", and in order "to balance municipal and federal books, family treasures have been sold off, public sector assets privatized, service management contracted-out; and land has generally been given away or sold at lowly fire-sale prices" [Merrifield 2014: 25]. Such a "landscape" does not foster pro-social orientation, neither does it benefit the development of public goods and coopera-

tion [cf. Ferrari 2016], which together could form an opposition to the neoliberal reality which sabotages the welfare of broad social categories, promoting wealth of a small – one could even say hand-picked – part of the society. Unfortunately, the welfare of the few is not without consequences to the situation of the many, particularly those living below the poverty line. That is why we are in serious need of an engaged sociology of welfare, which unmasks practices of exclusion and proposes innovative changes within the existing welfare state institutions and constitutes an important element of active work towards the improvement of living conditions.

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Mariusz Baranowski

SOCJOLOGIA DOBROBYTU W NASZYCH CZASACH. JAK SPOŁECZNE, POLITYCZNE I EKONOMICZNE NIEPEWNOŚCI KSZTAŁTUJĄ WSPÓŁCZESNE SPOŁECZEŃSTWA

Streszczenie

Niniejszy artykuł próbuje przybliżyć podejście socjologii dobrobytu do problemów i dylematów współczesnych, rozwiniętych społeczeństw kapitalistycznych. Oprócz charakterystyki obszarów zainteresowania socjologii dobrobytu, szczególnie w kontekście ekonomii dobrobytu i psychologii pozytywnej, nacisk zostanie położony na opis kondycji współczesnych społeczeństw. W tym celu użyty zostanie termin „niepewność", który dobrze nadaje się do charakterystyki różnych wymiarów ponowoczesnych społeczeństw. Należy jednak pamiętać, że koncepcja socjologii dobrobytu nie stanowi (z wyjątkiem prac ekonomistów nad prekarnymi formami zatrudnienia) wyartykułowanego punktu widzenia. W ujęciu socjologicznym kategoria dobrobytu posłuży do analizy zmian w strukturze zróżnicowania społecznego, jak również w relacjach społecznych, możliwościach edukacyjnych, postawach politycznych, wzorcach konsumpcji i wypoczynku, by wymienić tylko kilka. Wszystkie te zmiany odzwierciedlają nie tylko wpływ globalizacji na systemy zabezpieczenia społecznego, ale także konsekwencje rewolucji technologicznej i wyzwań demograficznych na subiektywnie postrzegany dobrobyt społeczny.

Słowa kluczowe: socjologia dobrobytu, niepewność, sprawiedliwość społeczna, prekariat, antyspołeczne zmiany instytucjonalne

PATRICIA PFEIL*
University of Applied Sciences Kempten
UDO DENGEL**
University of Applied Sciences Fulda
MARION MÜLLER***
South German Institute of Empirical Social Research e.V., Munich
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CULTURAL-SPECIFIC DIMENSIONS OF SOCIETAL RE-FORMATION WITHIN THE GERMAN MIDDLE CLASS

Abstract

The article examines ways of re-formation of the (German) middle class caused by the perception of social (and individual) crises (in our example over-indebtedness) and associated uncertainty. Which are the strategies that middle-class members develop to cope with those perceived crises and which factors contribute to the originating of new civic formations? In that context, we emphasize on the impact of culture-specific orientation patterns regarding specific societal groups. We refer to the work of Douglas and Wildavsky [1982] and Cornia, Dressel and Pfeil [2016] and concentrate on the collective dimension in asking, how does the middle class and parts of it like societal subgroups (in our example overindebted people) perceive and interpret social developments and crises (framing)? Which is the relationship between the middle class and institutional actors and the confidence they have in these actors, especially regarding the dealing with social crises and connected solutions? Who do middle-class members blame for the crises and the risks

* Prof. Dr; e-mail: patricia.pfeil@hs-kempten.de
** Dr; e-mail: udo.dengel@sk.hs-fulda.de
*** Dr; e-mail: marion.mueller@sine-institut.de

of social decline (blaming)? This is a central question directly connected with the way of dealing with risks and the assumption of responsibility.

Keywords: middle class, social crisis, over-indebtedness, re-formation, German middle class, cultural-specific dimensions, civil society, social risks

This article deals with the question of types of 're-formation' of the insecure (German) middle class in times of crisis.[1] The aim is to emphasise the influence of cultural-specific orientation on social groups. This is exemplified in the group of overindebted middle-class people. Two perspectives appear to be central: first, the *individual perspective* and related strategies of these actors, and second, the *structural perspective* at the level of action in organisations or networks. The focus is on: How does the self-positioning of the middle class change in crisis situations? It is about the dialectics of the social conditions, which are perceived and adopted as 'critical' by the individuals on the one hand, and their reflexive interpretation and acting (re-) formation towards a (new) formation of the middle class on the other. This, in turn, provides opportunities for living together in community and society. In doing so, we focus on the (self-) positioning of the actors as middle-class members in the context of the increasingly complex everyday societal world.

MIDDLE CLASS AND CRISIS

The middle class is one category of a model of society, which can be subdivided into three classes: the upper, the middle, and the lower.[2] Of course, society can also be described in more differentiated terms: social milieus, which have been introduced into the scientific discourse with Hardil [2000] and Vester [2001] as well as Schulze [1995] were introduced into the public discourse with the sinus

[1] The research group of the author of the Kempten University of Applied Sciences is involved in various projects and work on the subject of social risks. The aim of the Kempten University of Applied Sciences is to give this area the attention it deserves in the current tension between social change and social issues and to broaden the spectrum of research.

[2] Already authors of classic sociology deal with the concept 'middle class'. Vogel [2010] provides an overview of their assessments. Common to them (be it Simmel, Bourdieu or Marbach) is that the middle class is a poorly delineated category. The Chicago School tries to handle the problem qualitatively-empirical: in doing so, there can be taken a view over the subjective perspective of potential middle-class members on their life situations as well as on the handling of living conditions.

studies. They aim to describe society in its sociocultural diversity and to show that, apart from vertical differences, there are also horizontal ones. People differ in their social situation, but they also differ in their basic principles: tradition, modernisation or individualisation and reorientation. These basic orientations form the basis of the social milieus of the centre. Visible here is fear of social exclusion and experiencing fear of losing their attained standards of living as members of the middle class.

In our understanding, a crisis in the middle class, is defined as the consequences of the perception of social crises and the accompanying uncertainty, as described in Feuilletons [cf. Lessenich, SZ of 17/06/2016] or in the sociological science landscape [cf. Burzan 2014, Nachtwey 2016]. The middle class is understood by Müller et al. [2017] as a category of 'relational self-attribution' and at the same time assured social-statistic variables [cf. Müller et al. 2017: 8f.].

Society as we experience it today is characterised by a multitude of social, economic, individual, technological, and political risks, as Beck [1986] described in his book about the risk society. Currently, it is the risk of unemployment, the ever-higher costs of living in the metropolitan area, as well as the refugee crisis, climate change, etc., which are perceived in different ways. The middle class is affected by these risks and feels threatened by the fear of having to rely on welfare state security standards, the reduction of these benefits and the resulting lower legitimacy of the welfare state, which is borne by the middle class.

It is therefore important to ask which innovative, individual, as well as associative ways do middle-class members seek and find and what barriers do they face as civil society actors considering their fear of social decline? With this question, we follow the results of Müller et. al [2017], which identified strategies for the identification of over-indebted middle-class members who were threatened by social descent such as actively changing priorities, defending or not recognising the need for change. On the basis of these findings, it is needed to focus on the categories of action which can be found in the context of civil society and the engagement in civil society. Here we suspect the (re-) formation of middle-class mergers which show solidarity with their own inclusions and exclusions – civil society as both a social framework concept and an analysis concept.[3] That is to say, we define civil society as a relevant social structure which provides the possibility of the association of middle-class members and at the same time it is precisely these structures of the organisation of collective (or individual/indi-

[3] Cf. BMBF application ZiviReform, submitted by the Kempten University of Applied Sciences 2016; further research is planned.

vidualised) actions of middle-class members which are expected to be categorial results. Civil society is understood as a non-state, non-economic core of voluntary associations and associations of the public [cf. Habermas 1994 [1992]]. Civil society is unbounded [cf. Habermas 1994 [1992]], meaning it excludes neither individuals as actors nor types of the more or less established organisation of actors. We regard civil society as a separate area of action, with its own rules, designed by actors who generate their relevance from living worlds. On the basis of this, we focus on Maaser [2006] and Heidbrink [2006], who place individuals centrally, especially when it comes to taking over responsibility by individuals in society. The individual is involved as a responsible person in this context and is constitutive of civil society as a responsible society: The organisation of the community is increasingly shifted to the responsibility of individuals, similar to what Lessenich formulated with regard to the requirements of the activating state [cf. Lessenich 2009]. Civic, social, civil society commitment, in addition to the increasingly differentiated, empirically based assessment of the individual features mentioned [cf. Dengel 2014], is also discussed in its normative orientation and the analytically open view within the framework of real civil society, including civilian disobedience etc. [cf. Olk and Hartnuss 2011], sometimes also in the attempt to overcome separation between the terms civil society and real civil society [e.g. Conradi 2011]. We accept the ambivalence and ambiguity of the previous elaborations as given in order to let those affected to express their own views. Civil society serves as a structural framework, as a field of action, as a specific mode of action, where associative (new) formations can be explored in the face of crises of the middle class. Last but not least, it is the middle class that is addressed when it comes to social cohesion. 'The middle' of society is to be supporting for the whole of society and seems to be in crisis itself [Lessenich 2009].

COPING WITH SOCIAL RISKS (FRAMING, INSTITUTIONAL TRUST, BLAMING)

In addition to the framing of civil society, we are working on the basis of the risk culture concept, as introduced by the fundamental work on the relationship between risk and culture by Douglas and Wildavsky [1982]. From a sociocultural perspective, risks cannot be viewed exclusively as an objective dimension, but are presented as a social construct that is spatially and time-bound. We choose the concept of Cornia, Dressel and Pfeil [2016] and use it for exploring the (new) formation of the middle class in times of social transformation and crises by emphasising the influence of cultural orientation on social groups or societies. In

order to deal with social crises (or perceived crises), three correlated dimensions are used, which can also be applied to the classification of over-indebtedness as a crisis: *framing*, *institutional trust,* and *blaming* strategies. Framing means how people interpret the effects of crises or disasters on their lives. *Frames* are interpreted as cultural and social interpretative schemata that enable people to organise the world meaningfully by selecting some aspects of perceived reality and combining them into a narrative that allows them a certain interpretation [cf. Entman 2010: 391]. The focus is on the question of how the relationship between members of the middle class, the civil society actors, and e.g. the banking sector or the judiciary, is shaped and the trust they have in this respect, particularly with regard to the handling and resolution of societal crises. A further aspect is the collective dimension; here we will ask how the middle class and parts of it as social subgroups (such as overindebted people) perceive and interpret crises (framing), as groups, not as individuals. The third dimension comes from the question of who is blamed for the dangers of decline and crises – a central question that is directly related to the way in which risks are handled. Particularly interesting is the question of whether differences in blaming strategies can be found or whether they are shaped by cultural-specific ideas which are largely shared by the middle class. Douglas and Wildavsky [1982] refer above all to a "policy of the guilty" to social risks, in which the assignment of blame serves as a kind of "restoration" of the social order – something for which crisis-shaken middle-class members must perform identity work [cf. Müller et al. 2017, Pfeil et al. 2015]. Cornia, Dressel and Pfeil [2016] focus on their consideration of sociocultural differences at the country level with regard to dealing with material risks such as natural catastrophes or crises caused by technical or human failure. This approach involves the different structural, social, and cultural conditions that lead people to behave in different ways in the event of crises.

The discourse that constitutes *framing* occurs in everyday life: the way people define problems and find causes and explanatory patterns for them is characterised by social structures and cultural values, and at the same time serves the construction of social reality [cf. Berger, Luckmann 1969]. By encouraging or questioning the prevailing patterns of interpretation, people shape their perception of crises or conditions. A crucial aspect arising from the definition of *framing*, the perception of crises, is the importance of the effectiveness of human interventions: whether people, for example, prioritise the capacity to cope with the crisis and to act as active agents, or, on the contrary, to experience the risks helplessly. Especially with respect to the middle class and its real fears and worries about social decline due to unemployment, too little protection in old age, housing shortages,

or the fear of individual disadvantages due to politically opening up society for refugees, the significance of this dimension becomes clear – including beyond all disasters. From the research of Cornia, Dressel and Pfeil [2016], it can also be seen that cultural differences influence these perceptions. We did not examine the differences between the cultural and national experiences of different social strata or milieus. Here, research such as that by Douglas and Wildavsky [1982] indicates that middle-class people react extremely sensitively to both potential as well as real individual burglaries when they see themselves robbed of their status.

The second dimension, institutional trust cf. Cornia, Dressel and Pfeil [2016], follows this question of the interpretation of crises. Fundamental trust in public institutions goes with the perception of individual as well as collective (exclusion) fears of the middle class, as Nachtwey details [2016], to cope with this (perceived) crisis situation, or there is a feeling of being left alone – primarily – by state and political institutions or being deceived by other society actors such as banking. This dimension, which also plays a central role in the model by Douglas and Wildavsky [1982], can show differences in the perception of support from institutional actors. The decisive criteria for the respective attitude are the perception of the risk of decline, the acceptance and compliance with the regulations of the public authorities and their evaluation.

Finally, the dimension *blaming* (the manner of the debt attribution) is included in the model. Here, the attribution of responsibility for relegation and personal destiny to certain addressees is investigated. The focus is on the question of whether individuals are responsible for the crisis, for example, the authorities, those affected, or other entities (such as supernatural powers, accidental misfortunes, fate or natural events) cf. Cornia, Dressel and Pfeil [2016]. As already pointed out by Douglas [2003], the way in which debt is to be credited is a culturally established practice with the normative function of maintaining social order and legitimating social institutions and social ethics. The typical *blaming* strategies serve to maintain certain ideas of the right social order [cf. Lupton 1999; Tansey, O'Riorden 1999]. There are also specific blaming strategies in the secularised societies of the present, such as the death of a responsible person or an accident caused by the behaviour of a particular person [cf. Douglas, 1992]. The *destiny* concept of traditional societies is contrasted by a *risk* concept which can be used to explain "deviations from norms, accidents, and frightening events" [Lupton 1999: 3], since risks are seen as conceptual. For example, "natural" catastrophes, such as Hurricane Irma in September 2017, can be interpreted in traditional societies as an expression of the action of God, whereas in modern societies it is a consequence of human action (or, in the case of "Irma", anthropogenic climate change). In particular, it can

be seen as negligence on the part of the competent authorities and political actors who have failed to take appropriate preventive measures, for example, measures to safeguard residential areas in flooding areas. The risk-culture concept – in the sense of a culturally elaborated category for coping with uncertainty in a context characterised by secularisation and technological/scientific progress [cf. Wynne 1992], is connected with the notion that the future can be changed by human intervention and that risks therefore imply human responsibility. Although individual interventions can neither prevent banking system crises nor an increasing rate of unemployment, the dangers must be observed and anticipated, and at least appropriate emergency plans prepared, meaning the course of the crisis must be influenced in advance [cf. van Loon 2003; Zinn 2008]. Interventions, therefore, play an important role. The prevailing understanding of 'risk' is strongly based on the formability of the situation and decisions made by governments and the competent authorities, but also by individual persons.

However, it must be asked, to whom the *blaming* strategies in industrialised societies are directed and which context can be produced with regard to the insecure middle class? Is the middle class responsible itself? Or should the state take responsibility? On the one hand, people in Germany increasingly tend to make political leaders, governments, and offices responsible for the dwindling security and social changes. On the other hand, many researchers have emphasised that, with the increasing spread of neo-liberal individualisation tendencies, a shift of responsibility from the state to the individual citizens takes place, whereby the importance of the self-responsible private initiative generally increases [cf. Halvorsen 1998; Scott 2005; Tulloch 2008]. In the prevailing image of the activating state, the image of a society is depicted in which the latter is responsible for the individual welfare of the citizens, but they have to take responsibility for society in the interests of society and bear responsibility towards society. Thus, the attitude to citizens who cannot or do not want to meet these requirements varies between exclusion and activation.

THE INFLUENCE OF CULTURAL-SPECIFIC ORIENTATION PATTERNS – THE EXAMPLE OF COPING WITH OVER-INDEBTEDNESS

The following remarks are intended to show how this approach can be made fruitful to grasp the handling of the crisis of the (German) middle class and its re-formation. As mentioned above, the influence of cultural orientation on social groups and the middle class as a social situation should be emphasised.

We continue to ask what is the relationship between the middle class and institutional actors and about the confidence of the middle class in this relationship, particularly with regard to dealing with and resolving social crises. And finally, to whom is the responsibility for the dangers of social decline and crises attributed (blaming)? This is a central question which is directly related to the way in which risks are handled and responsibility assumed. People from the middle class have so far rarely been in focus when it comes to the issue of over-indebtedness. Nevertheless, these people exist. Our research[4], which is concerned with the increasing social phenomenon of the overindebted middle class[5], has been able to show what it means for middle-class people to be insolvent; how they are under pressure when they lose the financial resources that characterise them as members of their class.

A particularly intensive effort is necessary in the middle class. This is reflected, for example, when respondents are confronted with the question of changing themselves due to their financial worries and of being perceived or addressed differently in negotiations with their environment.

We have found, through our work with the identity strategies of overindebted couples from the middle class, that they continue to identify themselves with the values and norms of the middle class, even if they are not part of the middle class in terms of their financial performance [cf. Müller et al. 2017] and the existing institutions barely provide them with a fixed framework for their social location. It is true that milieu concepts suggest new possibilities of social-structural identification of classes, which lie transversely to the conventional understanding of the three-part-division in upper, middle, and lower class. Explicit reference

[4] The data come from the project "Identity work under pressure – what practices are used by overindebted people from the middle class to deal with their vulnerable social identity, and which action options and action barriers arise from it?" (2012–2015) which was funded by the German Research Foundation. Data collection and analysis are based on Grounded Theory methodology [Strauss, Corbin 1996]. Mainly narrative-biographical interviews with the same interviewees (mostly couples) at three different points in time and with gain for the development of theory were included successively.

[5] We adopt the Chicago-School perspective (see footnote 2) by measuring the middle class with social statistics criteria (completed vocational training/ multiannual employment, living in relatively secure conditions until over-indebtedness) before people are included in the sample – but above all, it is the subjective self-assessment of the protagonists who mark the placement in the middle class. In our analysis, we remain open to changes in the self-placement in the middle class and changes in the definition of class itself. In doing so, we recognize new milieu perspectives (Hardil [2000] Vester [2001]) and take account of inequality research, as well as social diagnoses predicting that societies move beyond the class concept [Beck 1986].

of our results to existing models is scarcely possible, however, the direction in which (*re-) formation as members of a middle class* tends is evident from the respective statements of those surveyed. We note the excessive demands on the members of the middle class, who are adhering to middle-class criteria, and thus often become involved in a lasting individualised crisis. They find themselves in a position different from before and are no longer in a position which is believed to be secured, protected from financial material risks, but in a position in which they must reorient themselves. They are forced to re-evaluate their environment or their relationship to the environment or the institutionalised surroundings. How this is to be done is shown in the following by means of a few examples from the results of our study [Müller et al. 2017].

HONORARY OFFICE[6] AS A FORM OF CIVIL SOCIETY ACTIVITY (FRAMING)

We ask how people who are overindebted interpret their own debts for themselves, and which ways they find for not falling out of the perceived concept of the middle class. One way of feeling to be a part of the middle class, despite limited financial means and living under formal restrictions of insolvency law, is to continue life as a middle-class member in a different way. One form of this is activity in the honorary office as a form of civil society activity. The honorary office is based on civic engagement, which is still a middle class occupation, not just statistically [e.g. Munsch 2003]. Overindebted middle class members in our study follow the anticipated expectation of a generalised market or work society, they go on in doing as they were before in order to pay back their debts to society. This is shown clearly by statements such as:

> *It doesn't mean I don't work, just with my feet up. They always see that we do something or I do something* (Mr Winkler 22m1/183[7]).

To be visibly active has an external effect, by emphasising the tendency to 'stay on the ball' rather than 'pass the ball' to others to take care of it; particularly not the welfare state. The status of the ordinary (middle-class) citizen can only be

[6] Honorary office stands for the German term 'Ehrenamt' which has a special tradition in Germany in the field of voluntary commitment.

[7] Notation: 22 means couple no. 22 (consecutive numbering), m stands for male, w for female, 1 indicates the point in time in which the interview was conducted, 183 stands for the line number of the beginning of the quote in the interview. The interviews were conducted in German, relevant quotations have been translated for the scope of this article by the authors.

obtained, if (at the least) it is indicated that one's own doing is enough to provide for itself: "on the consolidation of the status of employment (achieving) a social citizenship status" [Castel 2005: 41[8]]. If the acquisition ceases, it will be necessary to hold on to alternatives in class and status. Civil engagement seems to offer such an alternative. In the labour market as well as in the field of civic engagement, individuals increasingly shape themselves into "the form and content of their paid and unpaid activity" [Hacket et al. 2004: 289]. And in the changed working world, in which demarcations between work and commitment/civil work are weakened, commitment/civil work becomes gainful employment. The risk of falling out of an adequate level of citizenship is diminishing and people still find themselves in a middle class community. The external effect and thereby the perception of being part of the middle class is maintained.

In the case of Mr Winkler, already cited, over-indebtedness is caused by an entrepreneurial (self) over-indebtedness, which then leads to unemployment. His former occupations (self-employed in the solar energy sector and graphic designer) are still important to Mr Winkler, especially at a time when the status of a middle--class worker is threatened and the profession or self-employment can no longer be exercised. The activities are synonymous with being active and thus a self-image of the active participant in the society. Mr Winkler is less interested in the content of the profession than in not being idle and showing it. He is now looking for alternatives to the activities in order to be able to continue to fulfil himself and others as a valuable active member of society: he works voluntarily in a welfare organisation:

> *I work very hard at the welfare organisation (...) in any way I can. The general public pays taxes which is where my money comes from to give anything back not that they're doing it for nothing...* (22m2/90).

Mr Winkler wants to compensate his work for the support he receives from the state/society as an aid recipient (within the framework of the insolvency): the active commitment can be interpreted as a service, which should continue to reflect being middle class. He wants to be thought of as being the same (in value) as others in the middle class as before (i.e., before the insolvency). Anything else would be 'weakness', which would lead to a visible descent into another class. He shows no weakness or passive need. Mr Winkler sticks to what he wants to be, as he defines himself as part of his class. He does this by indicating that he remains the same because he continues and does not let himself go:

> *But they see that it didn't ruin me, that I continue nevertheless* (22m3/109).

[8] Original quotations have been translated by the authors.

He thus follows the mode of the market or work society softened with new forms of civil engagement, because it is important to him to remain as he is, and not to be different by what he sees as new (precarious) conditions/circumstances as the basis of his identity. This is not necessary: he does not have to deal with any concept of 'completely different' economics, exchange, or merely passive reception. He does not enter into an alternative culture, but takes up what is offered to him as a status-dependent member of society, that is, to be able to enter the regular and 'honest' labour market via the conventional honorary office:

> *I'm just trying to get a job using this way (.) In the free economy, it's just hard for me (.) And I'm just trying to do it with the welfare organisation with all the training I can get there (.) That then I then have the opportunity (.) to get back on my feet professionally/use it as a way in ehm I think it'll happen (.) I also like the people better they all know me (mhm) they know what I'm like they know oh he can do it, he can do that, we'll take him* (22m2/1033).

To behave honourably makes him successful in the eyes of his children. The fact that he is studying is rewarded with recognition:

> *Your dad does what? He may not be out of the house and working, but he's doing something. He's learning* (22m1/181).

Likewise, neighbours reward his constant activity:

> *They say you look good and you're doing something in the garden, they don't see that I need four days for gardening while others need half a day* (22m1/96).

To name an honorary office as an alternative to previous work is essentially characterised by Mr Winkler's position and also by other interviewees.

PRIVATE INSOLVENCY PROCEEDINGS AND CONFIDENCE IN INSTITUTIONAL ACTORS

If we assume that over-indebtedness is perceived as a crisis that must be mitigated by middle-class behaviour such as the exercise of an honorary office or the demonstration of bourgeois commitment, the question arises as to how respondents perceive social and state institutions that bring confidence to counter this Cornia, Dressel and Pfeil [2016]. There are clear differences in the perception of the state, the legal system, the bailiff as an exercising power in the proceedings as well as other institutional actors such as banks, insolvency representatives, etc.

An example of this is the Pohl family. After a non-controlled, and in most cases barely anticipated, line of debt has been exceeded, the bank presents itself as an institution that does not tolerate debt. There are bank fluctuations, because

interviewees feel strangled by the bankers. For example, Mr Pohl believes that he has to protect his money against the bank, he does not escape the attachment to a second bank, nor can he evade being recognised as a debtor by his employer (24m1/173). Ms Lang experienced a similar treatment by the bank as a personal disappointment, when shifting a loan with an excessive interest rate:

> *That was really negligent what they did (...) It was so mean because I said who I was in good faith, I signed everything and thought they would help me* (9w1/352).

This happens because institutions are no longer reliable: banks as former professional lenders have been enticed into indebting themselves, they have presented debt-making as normality. The state, which encourages people to invest in oneself and to cooperate with the financial market, acts as an institution that threatens with penalties for non-payment of debts. Society or the state as a generalised other *shouts, you have to insure yourself* (2w1/806). Something is required; if you do not follow the demand *they'll try to dig your grave* (2w1/787). Previously supported behaviours have become invalid.

While some are trying to find their own solutions for themselves, for instance by exercising an honorary office and by redefining their own situation with the limitations of state intervention, such as the above-mentioned Mr Winkler, others are strongly oriented to the state opportunities and gladly make use of the framework that is at their disposal as well as existing support opportunities. Interviewees who see only a small amount of manoeuvre for themselves for their own actions and feel helplessly exposed to a system are less able to deal actively and positively with these circumstances – after they have previously ignored all warnings from banks and bailiffs. These attitudes are also varying not only between the interviewees but show that the attitude to the state and state interventions change over time. In general, while in the phase of over-indebtedness and before the possibility of private insolvency is considered, the state with its representatives appears to be a threat, sometimes an opponent, who urges, warns, and demands. A change takes place regarding this perception when private insolvency proceedings are initiated. Here is consistently found that the interviewees consider the private insolvency procedure, which gives them the opportunity to make up their minds, to be extremely positive and helpful.[9] The state and its institutions are demanding for them, but at the same time they show an extremely long and exhausting path to be part of society again. In addition, the interviewees are sometimes treated unfairly and abandoned by the welfare state,

[9] https://dejure.org/BGBl/2013/BGBl._I_S._2379

complaining about the impositions on them by the procedure, and in contrast to other beneficiaries. While they "do nothing", they experience themselves as part of the active population, the middle class society.

Thus, the state and the various institutions involved in the insolvency process are perceived as quite contradictory: while on the one hand the feeling of being surrendered exists, on the other hand, the interviewees clearly perceive the opportunities of the process.

ATTRIBUTION OF DEBT AND RESPONSIBILITIES IN THE PROCESS OF INSOLVENCY (BLAMING)

It is not only the role of the state and the regulating authorities that the respondents perceive as different, but also the attribution of responsibility for their own situation. Who is responsible for the impending descent, for the restrictions imposed by private insolvency (blaming)? The way in which debt is attributed as a culturally established practice contributes to the normative consolidation of their own position as a middle-class member, which is found to be attacked. Even if over-indebtedness – unlike in the case of Cornia, Dressel and Pfeil [2016] or Douglas and Wildavsky [1982] – is dealt with individual crises, the question of responsibility arises. While in the case of catastrophes such as an accident in a chemical plant or even devastating storms such as the above-mentioned hurricane, the responsibility of the state (as the one who establishes the rules, perhaps not controlled, does not create sufficient precaution to protect citizens, etc.) is perceived as self-responsibility (how do I take precautions?) or as fate (and as a result of which self-perception can be experienced as a result of action), a differentiated and contradictory picture emerges in the case of the respondents.

Does the question of the responsibility and the guilt of the over-indebtedness in itself or the responsibility for the impending descent from the middle class apply? With the application of private insolvency, financial failure manifests, with its continuity being the real impact. In the increasing course of time, respondents are experiencing the limitations imposed on them by the procedure more and more. Self-evident components of a middle-class life such as mobility, education, consumption, or cultural participation are now becoming a rare asset. The experience of not being able to participate generates a lot of despair among the interviewees; they feel their middle-class identity is threatened. And here we also find blaming, which refers to the existing situation and concern for the descent from the middle class. This is no longer their own behaviour, not the behaviour of their husband, business partner, the bank, rather, the perspec-

tive here is directed to the state and the impositions imposed upon them by the insolvency proceedings. This places too high demands on people: the duration is too long, the rules of conduct from the procedure too restrictive, support is too low. Not the over-indebtedness *per se*, but the implications of the procedure form the limits of belonging to the middle class for them. As a result, the questions of the fairness of these requirements and the lack of further support are posed and set as a delimitation against "below", against their own middle-class values. Most compatible to these outcomes are the versions described by Haus[10] [2015] of how the middle class handles its situation, e.g. the plundering interpretation (as a reference to the discourse about the middle class as the actual support of the welfare state for which nothing is done from the part of the state, while for others much is done) or the so-called 'Prekarisierung' interpretation (the fear of becoming under class).

These categories describe what our study group discloses when they present themselves in their own over-indebtedness situation. The responsibility for the over-indebtedness of some respondents is quite self-critical:

> *We always had like blinkers. Somehow it will work and then he bought me a blouse, come on, it is only two Euros set on the top of the rates (...) and consequently the rates got higher and higher (...) I would say for me it was like an addiction* (1w1/16).

This responsibility is ascribed to one's own consumer behaviour as well as in the case of Mr Winkler quoted above, to a result of wrong decisions (since the real reason is his serious illness and thus the impossibility of revising it) and thus his own action, his own responsibility; the reasons are usually different. Others blame the state, the insolvency administrator, the banks as well as the closer environment, be it business partners or even family.

And here the inconsistency of the situation becomes clear. Respondents perceive themselves as part of the middle class with shared values and norms such as the above-mentioned aspect of participation in active society, or in honorary office, they see themselves committed to the activating state with the requirement of an individual community orientation and as a bearer of values such as diligence, honesty, commitment, leadership, and social participation. At the same time, however, they feel marginalised because they can only implement middle--class actions such as decision-making autonomy, financial autonomy, and cultural education through the intervention of the state mostly with difficulty or not at all.

[10] We are dealing here with interpretive patterns which describe the relationship between the welfare state and the middle class.

CONCLUSION

One (and by no means the only) strategy to deal with fear of exclusion is to revert to 'real' values. Values that others seem to have forgotten: to be a good person. This is in contrast to self-images that have become obsolete.[11] 'Reversion' means that the respondents have to follow (self-) identification or positions that were already there (known), but because of socialisation into real world, that is personal and occupational contexts of a market of self-assertion(s) they had to orient this way. With the focus on forgotten, conservative, and 'truly' good values, the respondents do not enter into a new world. Rather, they are drawn back to what was already and always there, but never – as it 'actually' should be – enforced. This is because the good – in this case, for example, the non-economised, the family, the community – was superimposed by the values of individualised achievement, competition, or growth. Both directions find their place in the discourse about middle-class positioning.

Respondents are embedded in this social context of the competing perspectives on the (middle) class. What changes for them is the weighting of the orientation to the competing perspectives. What has remained after insolvency/over-indebtedness is more important and is often to be found in the family, religion, or a good life. People retreat to what is left, and this is the immediate community (e.g. the family or the neighbourhood). If the world is (or has become) hostile and takes away material goods, the family or community helps. This retreat does not require any particular justification. It is only about the intensified resumption of seemingly existing views and positioning.

In view of the insolvency with which the respondents of our research are confronted, they are looking for 'new orientations'. They must also do so in the face of the changed situation in which they can barely participate in the life they have been accustomed to. These orientations are, however, partly not so new, but are embedded in well-known modes, e.g. of working-class society.

On the one hand, possibilities of reorientation are perceived and this is precisely in the context of the civil society commitment, which allows (self-) perception as a member of the middle class. Here, new perspectives can be linked to people who are also engaged, and at the same time specific relations can be established to people who need help, in a situation which is asymmetrical to the individual position of the respondent: More likely, the middle-class position can be maintained more easily because it is possible to introduce potential for a lower class.

[11] Or both have always been right next to each other.

On the other hand, the interviewees succeed in describing themselves by way of delineation strategies to others in such a way that people are actually on the right path and represent the 'right' values of the middle class. Business partners, banks, insolvency administrators, and the state as such are accused of being jointly responsible for their own precarious situation. The established institutions dissociate themselves, which makes people's own situation more bearable, because it is accompanied by debt relief and forgiveness.

These findings are linked to other current political discussions. Problems are dealt with which address the middle class as support for the welfare state, inasmuch as it is no longer able to meet its demands as support. It is precisely with our investigation of middle-class members, who are confronted with a concrete problem situation (combined with the risk of falling out of their class), that we can find out something about how they re-form in the long term. This can be achieved by doing research over longer periods. Will middle-class members turn actively, politically against institutions which have become unreliable to them, and how do they do that in concrete terms? Do middle-class members find new associations, like-minded people, who struggle against the mainstream in the community (especially in the case of problems such as over-indebtedness and apprehension) – as is the case today in Germany in many respects? Or do they confine themselves to 'good' commitment, as we have seen in our study?

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Patricia Pfeil
Udo Dengel
Marion Müller

KULTUROWO-SPECYFICZNE WYMIARY SPOŁECZNEJ (RE-)FORMACJI (PRZEKSZTAŁCENIA) KLASY ŚREDNIEJ W NIEMCZECH

Streszczenie

Artykuł przedstawia sposoby re-formacji (przekształcenia) klasy średniej w Niemczech, które zostały spowodowane przez postrzeganie społecznych (i indywidualnych) kryzysów (w prezentowanym przez nas przykładzie – nadmiernego zadłużenia) i związanej z nimi niepewności. Jakie są strategie, które rozwinęli członkowie klasy średniej, żeby poradzić sobie z postrzeganymi kryzysami i jakie czynniki przyczyniły się do powstania nowych form społecznych (obywatelskich)? W tym kontekście, podkreślamy wagę wpływu kulturowo-specyficznych wzorów orientacji w odniesieniu do specyficznych grup społecznych. Przywołujemy prace Douglas i Wildavsky'ego [1982], a także Cornia, Dressel i Pfeil [2016] i skupiamy się na zbiorowym wymiarze, kiedy stawiamy pytanie: Jak klasa średnia i jej części (podgrupy) – w naszym przykładzie osoby nadmiernie zadłużone – postrzegają i interpretują rozwój społeczny oraz kryzysy (ramowanie/*framing*)? Jaki jest związek pomiędzy klasą średnią oraz aktorami instytucjonalnymi w zakresie pokładanego w nich przez klasę średnią zaufania, zwłaszcza w odniesieniu do radzenia sobie z kryzysami społecznymi i związanymi z tym stosowanymi rozwiązaniami? Kogo członkowie klasy średniej winią za te kryzysy i ryzyko społecznej degradacji (obwinianie/*blaming*)? Jest to centralne pytanie bezpośrednio związane ze sposobami radzenia sobie z ryzykiem i przyjmowanym założeniem o (kierunku) odpowiedzialności.

Słowa kluczowe: klasa średnia, kryzys społeczny, nadmierne zadłużenie, re-formacja, niemiecka klasa średnia, kulturowo-specyficzne wymiary, społeczeństwo obywatelskie, ryzyko społeczne

MACIEJ D. KRYSZCZUK*
Independent Scholar
MICHAŁ WENZEL**
SWPS University of Social Sciences and Humanities
DOI: 10.26485/PS/2017/66.4/3

NEO-LUDDISM: CONTEMPORARY WORK AND BEYOND

Abstract

Neo-Luddism is based on the belief that modern societies cannot transcend the (capitalist) division of labour and official labour institutions. This paper traces the intellectual sources of Neo-Luddism, proposes a typology, and examines its relevance for studying contemporary work. We differentiate four types of Neo-Luddism. Economic Neo-Luddites (1) act on anti-libertarian instincts and advocate re-agrarisation or reindustrialisation to prevent unemployment and degradation of the community. They are apologists of primeval groups such as the family, nation or religious community, and they postulate reconciling work efficiency with non-economic values and collective life. This attitude is linked in the economic sphere to romantic-pastoral Neo-Luddism (2), associated with environmental movements questioning modern mass production, manifested in fashion for ecology, vegetarianism, and naturalist escapism. The romantic variety may or may not have religious connotations. Furthermore, we distinguish (3) spiritual-ideological Neo-Luddism. This trend is characterized by scepticism toward mainstream science and technology and, broadly, to materialist epistemology. A separate strand is the so-called anarchic Neo-Luddism (4), which directly draws inspiration from the sabotage tactics used by original Luddites. It attacks the state, technology

* Dr; e-mail: maciej.kryszczuk@gmail.com
** Dr, Institute of Social Sciences, Faculty of Humanities and Social Sciences; e-mail: mwenzel@swps.edu.pl

and science (the technosphere) with methods borrowed from the 'enemy'. Its representatives are anarchoprimitivists, cultural saboteurs, cyberpunk culture, hackers, etc.

Keywords: Neo-Luddism, capitalism, division of labour

Scholars of different traditions agree that Luddism, as a social movement and a set of specific anti-modernization attitudes, was born at the turn of the 18th and 19th centuries. At that time, and for the first time on such a broad scale, English craftsmen massively lost their jobs in connection with the industrial revolution and the introduction of machinery into factories. As a result, in place of skilled craftsmen poorly trained workers were employed, who after a short training were able to handle weaving and knitting machines. The economic cause of the subsequent reactionary riots was the fear that introducing machinery into factories would contribute to poverty and unemployment among workers and would lead to the collapse of craftsmen's workshops. According to legend, the name of the movement comes from the worker Ned Ludd, who in 1779 furiously shattered two knitting frames.[1] This act of destruction has become a symbol of resistance to the all-encompassing mechanization of industry and the replacement of workers with modern technical devices. Over time, Luddites became so troublesome for the rest of the population that the British army was used to quell them.[2] The high point of Luddite riots occurred in 1811–1813 (Nottingham, Yorkshire, Lancashire, Derbyshire, Leicestershire), when the movement was already organized and capable of exercising pre-democratic pressure (collective bargaining by riot). It was met with waves of acute government repression, including punishment by exile and death. Further waves of riots in the years 1816–20 were caused by the recession in the British economy after the Napoleonic Wars, and the last spectacular acts of the Luddites took place in the 1830s. Afterwards, the movement died out.

[1] "At least since the followers of Ned Ludd smashed mechanized looms in 1811, workers have worried about automation destroying jobs. Economists have reassured them that new jobs would be created even as old ones were eliminated. For over 200 years, the economists were right. Despite the massive automation of millions of jobs, more Americans had jobs at the end of each decade up through the end of the 20th century. However, this empirical fact conceals a dirty secret. There is no economic law that says that everyone, or even most people, automatically benefit from technological progress." [Brynjolfsson, McAfee 2011: 36]

[2] "The army sent by British parliament to put down Luddites in the peak period exceeded numerically the forces assigned to Wellington to fight Napoleon on the Iberian peninsula" [Muszyński 2016: 2]. This apparently indicates the military superiority of British workers over French soldiers.

However, as we will see, it later came back to life, facilitated by the internet, which has become a platform for new Luddite movements.[3] The goal of this paper is to propose a typology of contemporary strands of Neo-Luddism, taking into account their relation to the state, ideological orientation, and methods of action.

INTELLECTUAL TRADITION OF LUDDISM

Luddism is not an intellectual tradition *per se*. Its ideological foundations are latent and varied. In this paper we approach it from a sociological perspective, fully acknowledging that this is just one of many possible approaches. In this view, Neo-Luddism is a result of the normative affirmation of the *Gemeinschaft* as understood by Ferdinand Tönnies [1971], or the return to mechanical solidarity [Durkheim 1999]. Both the "natural will" (juxtaposed to the rational will by the former) and the penal law (as opposed to the restitutive law by the latter) correspond to the pre-modern human condition, which (not necessarily in the interpretation of these authors) is more human or primeval. In his classic work on division of labour, Emile Durkheim created a theory of social ties that sheds light on some aspects of Neo-Luddism. Inasmuch as this topic is well known, let us use a schematic shortcut: the notions of mechanical and organic solidarity correspond to two types of law: repressive (punishing for sins) and restitutive (recreating the status quo), linked to different types of organization of social life. The modern division of labour, with its individualistic approach to the human being, is based on organic solidarity. Social relations usually take the form of a contract (e.g. an employment contract), whereas under mechanical solidarity, which prevailed in pre-modern societies with a low degree of professional differentiation, social relations consisted in the convergence of individual and collective identity, i.e. an individual was shaped to reflect and resemble the community. The emergence of personality as a bundle of identities has complicated the processes of supervision and organization: control of individuals by the system (government, media, corporations), and control of the individual over the uncertainty posed by the environment. In other words, organic solidarity, unlike mechanical solidarity, emerges due to the existence of natural disparities between people derived from culturally coordinated social roles that allow individuals to complement themselves in order to better achieve their own goals [see Durkheim 1999].

[3] An internet search engine returns 98,900 hits for the term "Neo-Luddism" (data as of 27.07.2017).

There is another aspect of the labour market that, for our purposes, can be deduced from Durkheim's theory of social ties. The growing complexity of socio-economic life is accompanied by the expansion of institutional forms of organization and legal control (civil law, including labour codes), which require the employment and maintenance of appropriate personnel. It is true that different societies transit from mechanical solidarity to organic to a different degree and at a different pace, but the tendency to establish formalized, codified regulation is universal and results in widespread bureaucracy (not only in the public sector). Existing differences in civilizational standards, resulting from both cultural and political differences, as well as the material situation of a given society, are gradually becoming blurred as a result of globalization processes. For example, the establishment of a ministry for the protection of tropical forests may be locally specific, but any modern state must have the equivalent of a ministry of finance or justice.

Unification of civilization standards (as a certain variant of convergence) leads to the structure of the labour market in which there is a constant increase in the number of jobs and professions directly or indirectly related to: a) the functioning of the modern state (whether it be a democratic state or an authoritarian regime); b) the process of informationisation of the economy. In developed socio-political organisms, large structures cannot be effectively managed without the appropriate administrative personnel, databases etc., some of which can be successfully commercialized. The Neo-Luddist political-economic program in the liberal version, entails abandoning certain forms of contract (e.g. employment contracts), and giving up technological facilities (e.g. the media) and services guaranteed by the state (e.g. universal mandatory vaccination). It also involves some form of escapism from the media-information regime, which has become a source of attitudes and values. It seems that this is the (latent) platform of opponents of interventionism, who, in the name of individual freedom, demand lower taxes, reduced bureaucracy, and liberalization of restitutive law. In short, such a program postulates reducing the welfare state and returning to primitive communities and mechanical solidarity, with its repressive criminal law, operating on principles of sin and penance.

This interpretation of Tönnies or Durkheim provides a background for interpreting the evolution of societies, as well as explaining the utopian contemporary visions of the conservative-modernist community (modern nationalism). The Western model of modernization, which produced the global internet technology, has since its inception contained both the potential for positive self-reflection (a critical approach to the idea of progress) and negative self-destruction (the tech-

nological effectiveness of the Holocaust). In its optimistic version modernization, as the driving force for all humanity, also encompassed the inclusion of different cultural patterns (such as Confucianism, Hinduism, Christianity, etc.), incorporating attributes that serve adaptation to change (see Pobłocki 2017). At present, the semantics of modernization is broad and heterogeneous. It includes tradition and continuity, progress and regression, reason and emotion, myths and facts; and it contains an unorthodox reconciliation of the individual and the collective. This conflicting coexistence, on equal rights, of scientific truth, cosmology, political ideology, cultural patterns, and morality serves "subjectivity in difference."

As we know, in the first phase of industrialization, professionalization allowed for separation of the sphere of work from the private, thereby contributing to the process of empowerment of the masses (the working class). The system worked well when it was based on widespread employment, and the redistributive institutions levelled out drastic socio-economic differences and ensured an increase in civilization standards (in education, health care, pensions, etc.). The subsequent evolution of capitalism, in which smart robots enter the stage, will probably require a change of approach to the idea of progress. Permanent modernization, without a moment of rest, contradicts the cultural duality: the need for rest and work, stability and movement, continuity and rupture, etc. A large number of critical works have been written about the destructive effects of technological progress, and more broadly on the rationalistic heritage of the Enlightenment [Bauman 1989; Horkheimer, Adorno 2002; Zybertowicz et al., 2015]. Cataluccio [2006: 117] called it the golem that has escaped us, the power that brutally crushed us, one which we unleashed ourselves driven by the illusion that we are masters of the world.

The (latent) ideological interpretation of Luddism is presented in the works of sociologists, historians, philosophers and politicians [see Hobsbawm 2013; Nowak 2013]. In the 1990s, Keith Grint and Steve Woolgar [1997: 39–63] distinguished several perspectives within the interpretive tradition of Luddism. The first emphasizes the rationality of technology and the irrationality of the Luddites, and is part of the mainstream (liberal, western) understanding of civilizational progress, which is ideologically linked to the theory of universal modernization. Technology is presented here as an external and autonomous factor of development that determines the socio-economic organization and production relationships. Such a view can be characterized as technological determinism, which does not analyse the origins and effects of technological inventions.

In the interpretation close to Marxism, technology itself is economically and socially rational, and the realm of economic exploitation is capitalism. As Marx

[1887: 287] noted, "the contest between the capitalist and the wage-labourer dates back to the very origin of capital. It raged on throughout the whole manufacturing period. But only since the introduction of machinery has the workman fought against the instrument of labour itself, the material embodiment of capital. He revolts against this particular form of the means of production, as being the material basis of the capitalist mode of production."

In a narrower sense, new information technologies are sometimes considered as an effective means of articulating group interests (e.g. rights of internet users versus intellectual property rights). Depending on the interests involved, the enemy of the Neo-Luddites is either the system as a whole or individual elements, including the technosphere, the "free market", or "traditional" popular culture offered by the mainstream. For Marxists, technology is only negative when combined with a capitalist mode of production that use machines commercially to exploit people. Since capitalism is one of the factors of modernization, its rejection requires either a redefinition of modernity, or its negation (in anticipation of the revolution). The system can therefore be countered using its own tools, but economic rationality escapes civic control.

Luddism (and Neo-Luddism) is rejected by economic (neo-)liberals. In contrast to Marxists, economic liberals have warned against the nostalgic pessimism about industrial civilization, on the ruins of which a socialist utopia was to be born: "Those who want to set the clock of history back ought to tell people what their policy would cost. … It is certainly possible to stop the further progress of capitalism or even to return to conditions in which small business and more primitive methods of production prevail. A police apparatus organized after the pattern of the Soviet constabulary can achieve many things. The question is only whether the nations that have built modern civilization will be ready to pay the price." [Mises 1957: 237–238].

The emergence of a modern, anti-capitalist counter-culture rejecting technological progress can be traced back to the first half of the twentieth century, when the process of industrialization entered its next phase, the culmination of which was in the culture of modernism, and in both the economy and technology many revolutionary innovations emerged, for example, automated (Fordist) production and mass media development. Among the visionaries and critics of scientific, technical and economic progress are: Jacques Ellul [1964], Theodore Roszak [1986] and Ernst Schumacher [1973]. As Łukasiewicz [2000: 43] observes, "Contemporary opponents of technology condemned not only, as Marx did, the socio-economic system in which it was developed and implemented, but also the very notion of technology. They recognized science and technology as

autonomous and deterministic forces of their own, beyond the control of society. They believed that technology that requires prudent and rational behaviour, developed skills and a high degree of organization, acts in dehumanizing way, destroying quality of life, dominating people, cutting them off the natural world, and inhibiting them and their emotional development."

Automation is increasingly endangering human work. Consequently, there has been a sharp rise in interest in Luddism in humanistic critiques of Western industrial culture, and clear signals of civilizational escapism from the so-called mainstream modernization. This is reflected in such phenomena as: criticism of mass production and corporate organization; the affirmation of renewable energies; natural foods or traditional (rural) lifestyles; as well as projects introducing pre-modern modes of economic organizations. We analyse them as a package, ignoring for now the risk of antinomies. In the hypothetical conditions of abundance came the concept of the so-called circular economy [Pearce, Turner 1989], which proposes business models based on the conservation of raw materials (recycling), environmental protection, and durability of goods. The idea of a "zero marginal cost society" based on collaborative communities from imaginary history, is also described by Rifkin [2016]. Anthropologists of everyday life write about the processes of traditionalization, retraditionalization, relocation, indigenization, customization, and transculturalization, parallel to the modernization of the western world, pointing to the complexity of globalizing modernity [see Kuligowski 2012: 105–135]. These are not new dilemmas (compare John Hobbes's dispute with Jean Jacques Rousseau). However, the current context (the IT revolution, economic globalization, mediatization, disenchantment with science, automation of work, etc.) has greatly expanded the scope and impact of such attitudes and ideologies on the mainstream public opinion.

The emerging form of critique of global mass culture targets consumerist propaganda used by marketing, advertising and political actors, and the primacy of (excessive) economic growth, which is contrasted with an idealized past of stability, social security, and full employment (the myth of a golden age). While "old" Luddism was purely economic (utilitarian), and its main postulate was the protection and preservation of workplaces, the aesthetic-intellectual Neo-Luddism rejects the mainstream value system of Western civilization, linked to the rationalist tradition of Enlightenment, mass culture, commercialization, individualization, etc. In addition to critique of capitalism, Neo-Luddites blame economic liberalism for bringing about the so-called "crisis of values", equating liberalism with laissez-faire, unbounded freedom. They should be differentiated from conservative defenders of the idea of the immanent dignity of human work,

who combine their critique of capitalism with egalitarianism and a belief in social justice within a chosen locale or religious community.

Neo-Luddites have their congresses, where they prepare action plans. They see themselves as having an historical role in the struggle against the capitalist (post) industrialization and propose the following: "1) grounding their movement in philosophical reasoning, in certain established intuitions and theories, outlined by the well-known anti-technological movement, represented by such thinkers as Aldo Leopold and Lewis Mumford, Jacques Ellul, Paul Goodman, Rachel Carson and Wendell Berry, as well as contemporary Neo-Luddites; 2) disseminating a broadly understood Luddite philosophy, attempting to change the basic worldview of our technical society, to break away from the false deities which it venerates, such as materialism, rationalism, and humanism, which claim that the ultimate goal in life is to accumulate personal wealth, and their idols of exploitation, domination, profit, progress and growth; 3) replacing the dangerous false gods with guides who have proven themselves to be trustworthy, solid, and a source of inspiration for human society since the earliest times; who create forces, paradigms, systems and organisms of the natural world, a wonderful, sacred, invaluable and overwhelming divine biosphere on which every life depends – because then we will learn to choose and evaluate, create and build a technique of life, in all its harmony, variety and beauty."[4] There is a remarkable compatibility with the postulate of degrowth, found even in the publications of the Club of Rome and the European Parliament. Here is what the official Neo-Luddites specifically decided at their Congress: "1) everyone can take care of some piece of land, even a flower bed; 2) we can give up watching television; 3) we can limit or even give up driving; 4) we can eat the food produced in the area, cook our own meals, and invite our neighbours to dinner; 5) we can reduce the traffic of vehicles in the immediate neighbourhood." In addition, Neo-Luddites encourage support for local libraries and admonish that destroying someone's property is not the most effective way to make changes. It is difficult to disagree with such a claim.

The warnings issued by Neo-Luddites of different ideological orientations have in common the perception of a link between digital technology and the infantilization of culture: "Consumerism urges us to reach back to what we used as children and what the Bible told us to renounce, and to step into the new world of electronic toys, games and gadgets that make up the modern digital adult playground; the market apparently recognized that people do not have to grow up anymore. Instead of getting schools to help children grow out of toys,

[4] Source [access 24.08.2017]: http://www.zb.eco.pl/zb/150/luddyzm.htm

we bring toys to schools – video games and computers as learning aids, as well as commercially sponsored television in classrooms. … Traditional teaching methods cannot compete with the charm of the world of commercial games in which children become heroes or themselves determine the fate of Harry Potter." [Barber 2008: 25].

IDEOLOGICAL PERSPECTIVES OF NEO-LUDDISM IN 21ST CENTURY

It would take a separate monograph to give a full methodological justification for the use of the term Neo-Luddism, the clarification of its meanings and connotations, as well as the construction of a typology of Neo-Luddism. The related concept of "retrotopia" has become popularized in a book by Zygmunt Bauman[5] [2017]. In some respects, our own interpretation of Neo-Luddism links to the philosophy of Daniel Dennett's recently published book [2017] "From Bacteria to Bach and Back: the Evolution of Minds." Although we take a different (economic, sociological and anthropological) perspective and try to remain intellectually and emotionally detached from the subject matter, some similarities exist. They consist in the synthesis of the hypothesis of the "explosion of ignorance" with the observation of restricted rationality of industrial civilization and a set of more or less conscious reactions to technological progress mediating the lives of modern humans. These cultural phenomena are related to the slow but inevitably increasing displacement of people from production processes.

Practical visions of the future of human work must include, in addition to technological progress, the development of commodity markets and the objectives of the state economic policy, including changes in the broadly understood sphere of culture. We have already mentioned the shortcomings of Enlightenment techno-utopia, with its excessive optimism about the future created by unlimited market exchange. On the opposite pole are ideological currents sceptical or negative with respect to progress, imagined along the lines of a stereotypical narrative of a rationalistic Enlightenment that does not take into account the apocalypse.[6]

[5] Both Bauman and an occultist named John Michael Greer [2016] use the term "retrotopia" and voice a critique of economic liberalism (capitalism), while stressing the futility of conservatism. The term "Neo-Luddism" covers a broader range of attitudes to the mainstream civilization; not all of them are utopian or irrational.

[6] For instance, Kirkpatrick Sale [1995; an American environmentalist] and Kalle Lasn [2000; a Canadian writer and filmmaker] identify as Neo-Luddists. Their texts contain some further explications of the movement's goals and tactics.

The dispute between progressives and reactionaries has a long history, but never before has the scale and pace of scientific and technological interventions into social life been so great. We can see this in the pace of automation of work, first with mechanization of manual labour, and then with displacement by artificial intelligence of tasks requiring human intelligence (whatever it is). We use the term Neo-Luddism to describe, in different ideologies, a negative attitude towards scientific and technological human achievements (including achievements in the rationalization of production processes and allocation of capital), to specialized division of labour based on expert knowledge, and to automation, robotics and artificial intelligence.[7] We posit that this is not a homogeneous attitude. There are different varieties of opposition to "forces of progress" and different ways of understanding progress, and rejection can have varying degrees of intensification and rationalization: from total negation and cultural alienation (eremitism) to constructive criticism, reflected in a targeted rejection of only some manifestations of progress. The common denominator of Neo-Luddist attitudes is an affirmative attitude toward work, but understood differently from the Enlightenment tradition of professional division of labour, which is also seen as a source of danger by Neo-Luddites.

Our understanding of Neo-Luddism is based on the belief that a citizen of a highly developed country is not able to go beyond the (capitalist) professional division of labour and official labour institutions, as both markets and nation states have dominated the sphere of production and consumption. Neo-Luddist attitudes take on a variety of forms that cannot be attributed to conventional political, economic, or religious doctrines.[8] The notion of Neo-Luddism should include a description of distinctive elements in various attitudes in new global, institutional and cultural contexts. Unlike their predecessors, Neo-Luddites do not destroy machines (software programs, computers, smartphones, etc.) today, because modern tools (especially information technology) are not used for work only and are not consciously perceived and blamed for unemployment. There are other, less obvious syndromes of "opposition to technology," such as rejection of mass media coverage. The illusory belief in the possibility of creating an information agenda, based on independent sources, is shared not only by the young, educated active Internet users, but also by adherents of "alternative explanations" and followers of various conspiracy theories.

[7] We do not use the term alter/anti-globalism, as it usually carries a negative attitude to cultural and economic globalization, but does not question technological development.

[8] Neo-Luddism contains elements of Occidentalism, understood as criticism of western civilization, often encompassing hostility to modernization.

Economic Neo-Luddism

Economic Neo-Luddism highlights the necessity of democratic governance of capitalism, which is to blame, among other things, for technological unemployment, social inequality, and poverty. A modification of current forms of liberal social democracy leads to a vision of social order in which the general principles of free-market exchange (competition, private ownership) are preserved, but in a reduced version subordinated to public management. Sustainable development depends partly on the return to traditional or disappearing economic models, e.g. lengthening the production chain, creating parallel labour markets, promoting cooperatives or neighbourhood barter services, etc. The underlying idea is not rationalistic specialization or the professional division of labour, i.e. introduction of processes to improve efficiency, but the exact opposite, i.e. abandoning all technologies or processes that eliminate the worker from the production cycle, even when it is justified by utility maximization considerations [see Rifkin 2016].

The potential for system errors in such a design is enormous, because the ultimate responsibility rests with a human, not a machine. "Correct" narratives rather than rationalistic calculations oriented on long term-effects acquire political meaning. Neo-Luddist "social calculations" include not only unemployment costs and other economic outcomes, but also political and cultural externalities. Economic Neo-Luddites with anti-liberal attitudes tend to postulate either re-agrarization or reindustrialisation to prevent unemployment and the degradation of (closed) communities. This trend sometimes idealizes the primitive group (family), nation, or religious community, based on the principle of reconciling work efficiency with non-economic values and collective life.[9]

In the economic dimension, Neo-Luddism is opposed to the humanistic principle, which claims: the more jobs are automated, the more the labour market shifts towards occupations requiring specific human competence. However, there appears to be no convincing definition of what these supposed irreplaceable skills are. While earlier stages of civilizational development replaced menial occupations, sophisticated automation and artificial intelligence are now capable of replacing highly skilled jobs. An optimistic view holds that people have been and will be able to make a living providing useful work as technology progresses, because the society is able to generate more and more different kinds of needs and

[9] Ha-Joon Chang draws our attention to an interesting parallel: "The official economic ideology of Taiwan is comprised of three principles of Sun Yat-Sen, the founder of Kuomintang: minzu (nationalism), minquan (people's power) and minsheng (people's prosperity). These principles entail state ownership of key economic sectors." [Chang 2016: 189]. Many contemporary national-populist parties would agree with Sun-Yat Sen's principles.

thereby provide real opportunities to satisfy them, giving people a meaningful and socially useful work. Neo-Luddites, sceptical about progress, ask however: what will happen when machines overtake humans in every way or in almost all respects, leaving only a narrow group of engineers, programmers and individuals with the highest level of creativity not replicable by machines? It appears that IT specialists, paradoxically, are among the most endangered professions. "The IT revolution, which is the result of the invention of the computer first and later of the Internet, is replacing human beings by computers in the sector of broadly understood information services on a global, cross-border scale." [Celary 2013: 7]

As a result, Neo-Luddites naturally fall into an unintended alliance with technocratic etatists: for the former there is a case for limiting technological development, while the latter advocate social engineering under the compulsory welfare state or state administration of social needs, satisfied with services provided by professional officials (technocrats).[10] [Wiśniewski 2017].

Romantic-pastoral Neo-Luddism

Romantic-pastoral Neo-Luddism is linked to pro-environmental movements challenging modern mass production, such as the fashion for ecology, municipalism, vegetarianism, and local naturalism. The attitude of modern Neo-Luddites is often characterized by some form of "return to nature" and affirmation of a world that is homey, familiar, closed, traditional, stable, safe etc. Renouncement of material goods and folk escapism (more or less consciously performed) are recognized as a means of recovering spontaneous and direct human relationships that improve the mental and physical condition of people. "Great ideologies have their own simplified versions and popular variants deprived of intellectual depths. Naturism is environmentalism reduced to the terms of 'nature conservation' and 'return to nature'. These seemingly simple and attractive catchwords are not new and are not too rational. Resistance to technology assumed the form of a 'machine destroyers' movement as early as in the nineteenth century. At the dawn of industrial civilization, the romantic-conservative ideas of 'rejection of the artificial world' and 'return to nature' were born. These ideas were voiced in France by Francois R. de Chateaubriand or in England by the irrationalist John

[10] "Before, in social sciences the notion of technocracy was used to emphasize the imperative of professionalism in controlling public affairs, including macroeconomic ones. However, under the pressure of representative democracy (or rather its illusion, because someone ignorant cannot well represent the authentic interests of their electorate), technocracy is pushed aside, replaced by amateurship, political show business, populism, or simple stupidity [Kołodko 2013: 324]."

Ruskin. Naturism, which rejects human interference in nature, is today a deviation of environmentalism, but it is appealing to simple and conservative minds. What is naturism today? Proponents of this naive variety of environmentalism are inclined to accept at least three false principles: 1. Nature is the basic human environment; 2. Distance away from nature harms us, so we should – wherever possible – 'return to nature'; 3. By interfering with nature and manipulating it, people spoil and destroy it, and therefore nature must be protected from human activities. The acceptance of these three principles of naturism leads to behaviour that is indifferent to morality, customs and the economy and causes many irrational demands and activities." [Opara 2009: 196–197, 198]

The romantic-pastoral trend may or may not have religious connotations, which in turn have a heterogeneous relationship to the humane treatment of animals (hunting) and plants (forest cutting). The ethical disputes around hunting concern both the act of killing and in general eating of animals. Although domestic animals differ (also in terms of death) from wild animals, it does not follow that the act of killing is immunized [see Kruczyński 2008]. The allegedly romantic characteristics of the culture of hunting clash with the rationalism of industrial slaughter, while the awareness of these differences is also a rationalizing element of choosing sides of the ideological dispute.

A relatively new aspect is the intensive moral controversy over the so-called "animal rights". Equal treatment of different beings, regardless of species, and the imperative of avoiding suffering are postulates that derive from the humanistic principle of equality between people. The arguments of advocates of "species equality" refer to the holistic vision of the Earth as a community of all living entities (including plants), living in empathy and symbiosis. On the other hand, arguments of a religious nature are raised (the significant qualitative distinction of homo sapiens among species), as well as examples of distinctions in human rights and obligations (e.g. age criterion for electoral laws). Fukuyama [2008] puts it succinctly: the nature of laws depends on the nature of the species. Let us add that the relation of humans to other species affects the labour markets, as it includes the social production of goods for animals (fodder, veterinary products, services for pets, etc.) and plants (e.g. non-productive garden cultivation).

Spiritual-ideological Neo-Luddism

The spiritual-ideological form of Neo-Luddism attributes non-material, intrinsic value to work, emphasizing the ethical-moral dimension of economic activity. In this trend, dominant religions, ideologies, or para-religious movements

(e.g. New Age) articulate sceptical attitudes toward mainstream science and technology (i.e. materialist epistemology), and also question the capitalist world of consumption and commodity fetishism. As an example of spiritual-ideological Neo-Luddism (with pastoral elements), one may consider the statement by a sociologist and at the same time a conservative politician: "We must recognize that we cannot cope with endless challenges of an ever-changing kind, either as scientists, as citizens or as human beings. And the scope of changes will not diminish significantly. Yes, we should slow down scientific-technological development – if we want to get to know it better, to understand what it means for the shape of modern civilization, and what it means for humanity. Without this, the suicide of the Enlightenment is inevitable. The deity [of reason] is the part of the Enlightenment heritage which consists in the uncritical sacralisation of all scientific knowledge. There is a strong quasi-religion of scientism, that is, the view that knowledge built upon empirical data is a non-problematic good." [Zybertowicz et al. 2015: 446–452]

This concept is different from the popular idea of "sustainable development" in many ways. In addition to the inconsistent relationship to the status of scientific knowledge, cognition and critical thinking, spiritual Neo-Luddism is a distinctly religious concept, with the idea of clearly defined centres of power over "social forces" (and it does not mean democratic co-management based on rational thought). Perhaps there is a social potential for the emergence of theocracy in the West, but it is dubious what this attitude (ideology) would bring to science, sociology, or politics, or how it would solve problems of industrial civilization. Can the "self-repair of scientific and technical civilization" reconcile various religious strands, which developed a range of different anthropologies of humanity, as well as attitudes toward capitalism and labour? In general, everything that has been proposed here is repetitive, and the critical approach to the vast and diverse intellectual heritage of the Enlightenment seems to be false: why save something that is in any case doomed to destruction, and is evil from the point of view of Catholic human anthropology?

Spiritual-ideological Neo-Luddism calls for the rejection of the Enlightenment dogma of productivity, rationality, profit, and consumerism, which corresponds to the model of the economic man, selfish and individualistic. The cultural discourse landscape of industrialized countries has long contained an opposition to the domination of mass pop culture over local cultures, a contestation of the fetishization of economic growth and its quantitative indicators, (e.g. GDP), and in its place postulates the development of spirituality, a work-life balance, and religious or secular forms of humanization of labour relations. Pragmatists

of this trend propose to complement or replace the standard tools of measuring growth with development indicators, thus blurring the traditional concept of progress with subjective or qualitative concepts. Spiritual-ideological Neo-Luddism resembles the economic variant in terms of limiting capitalist development. It differs in that it assumes a social ideology, rather than basing its action merely on economic pragmatism (which, incidentally, is also an ideology, hidden in methodological individualism).

From the perspective of institutional change, this conservative attitude is a manifestation of the so-called 'dynamics of stagnation' [Chmielewski 2011: 221], which, in the socio-economic dimension, is manifested in the affirmation of existing conditions.

Anarchic Neo-Luddism

Although Neo-Luddism is grounded in opposition to the effects of technological advances, all of the aforementioned strands treat the appearance of robots or the Internet neutrally, as a phenomena appearing in the logic of technological development, but rarely seen as a root cause of technological unemployment. Anarchist Neo-Luddism, on the other hand, makes a direct reference to the original sabotage tactics used by the French and British Luddites. It is a separate type of attitude in which the state, technosphere, and science are attacked using the means and methods appropriated from the "enemy." Researchers classify this group as including: anarchoprimitivists, cultural saboteurs, off-grid movements, cyberpunk counterculture, technological libertarians, hackers, and especially, crackers. A sub-category of the off-grid movement are the so-called preppers, i.e. people permanently prepared for a catastrophe: preparing shelters, stockpiling food, wearing emergency gear, learning archaic survival methods, etc. In the United States alone, the number of people preparing for a disaster has been estimated at five million by counting Facebook likes of fanpages. This strand includes the actions of such anarchists as Timothy C. May (BlackNet). By means of cryptography he created a market for information on which undetectable and untaxable transactions could be made, which promoted the development of industrial espionage and trade in military secrets and classified material in the name of government collapse [Brunton, Nissenbaum 2016: 116].

Neo-Luddites are distinguished by their strong emotional dislike of various technological novelties: sometimes even the atavistic destruction of machinery and equipment is permitted, as is the use of violence. The most famous example of such an attitude was the mathematician and assassin Theodore Kaczynski (aka the

Unabomber), who in the years 1978–1995 sent bombs in letters to random people. Kaczynski intended to fight the "evil" resulting from technological progress, which he conflated with the imagined infantilization of culture. According to Kaczynski [2010], modern technology deprives people of freedom and leads to their "over-socialization", depriving them of the "process of power" – by which he understood individual responsibility for satisfying basic needs such as food or safety.[11] He also attributed independent effects to technology per se, beyond its embeddedness in any socio-economic system: "It is not possible to make a lasting compromise between technology and freedom, because technology is by far the more powerful social force.[12] [Kaczynski 2010:75]

Kaczynski's social views, though not necessarily his methods, are shared by a large number of Americans, who see the government as a threat to their own freedom and beliefs, sometimes directly questioning the position of official science, such as evolutionism, and instead proposing the theory of "intelligent design", or creationism. Conservative thinkers of republican views, when they think of excessive government interference in individuals' affairs, sometimes use stigmatizing terms such as "liberal[13] fascism" [Goldberg 2007].

Anarchoprimitivism (exemplified, to some extent, by Kaczynski) is a movement calling for abandoning civilized ways of life and for de-industrialisation of the sphere of labour. The rejection of the achievements of science and technology goes hand in hand with the old call (often attributed to Jean J. Rousseau[14]) to "return to nature" (the concept of a "noble savage"), and to develop a retrotopic social order based on natural law rather than the current order based on technological achievements, rationalized by materialist culture and driven by the profit-seeking, led by innovative entrepreneurs and progressive politicians. The characteristics of the life of a "noble savage" are a life in harmony with nature, generosity, and selflessness, innocence, inability to lie, faithfulness to tradition, physical endurance, renunciation of material goods, moral courage, and a natural or innate intelligence which yields "wisdom" as opposed to the "knowledge" supposedly shaped by formal education. The anarchoprimitivists believe that

[11] "Kaczynski's actions were murderous and, in my view, criminally insane. He is clearly a Luddite, but simply saying this does not dismiss his argument; as difficult as it is for me to acknowledge, I saw some merit in the reasoning. [Joy 2000: 2–3]."

[12] A more mainstream view is the opposite: that freedom creates conditions for technological development; see Florida [2002].

[13] "Liberal" in the American sense of the word, i.e. left-wing.

[14] Rousseau did not claim that such a state actually existed, but rather used these abstract categories to analyse contemporary affairs.

technology and science are similarly ideologized as traditional religions. They are even more dangerous to humans, because their paradigms are much more convincing than those based on mystical beliefs. The progress of civilization imposes a monopoly of a (materialistic) point of view. Institutional science is not concerned with anomalies, transcendence, New Age, miracles, paranormality etc.

We sum up this section by listing below the main socio-economic orientations and forms of cultural manifestations associated with different types of Neo-Luddism.

TABLE 1. Socio-Economic orientations and forms of cultural manifestation of Neo-Luddism

Type of Neo--Luddism	Socio-Economic orientation	Cultural manifestation
Economic	Moderate rejection of capitalism Return to a social market economy with strong state intervention Policies of "sustainable development" Reindustrialization and reagrarization	Moderate and/or inconsistent rejection of some forms of modern technology or communication Inconsistent attitude toward environmentalism
Romantic-pastoral	Moderate rejection of capitalism Hostility to any form of mass industrial production	(Naïve) environmentalism, rejection of scientific development
Spiritual-ideological	Communitarianism (possibly religious)	Rejection of both technosphere and social progress
Anarchic	Anarchy	Radical (sometimes violent) rejection of the contemporary order using tools offered by the technosphere

CONCLUSIONS

Model typologies of a dynamic process are convenient for highlighting microtrends, but in theoretical works the boundaries between categories are fluid and constrained by definitions, and real people, assuming contradictory attitudes, do not necessarily realize the existence of an abstract schema of their actions. However, how people see the world around them is important to the process. Neo-Luddist attitudes cannot be reduced to retrotopia or some form of modern neo-Marxism, but form a heterogeneous ideological collage. For example, opposition to certain aspects of economic globalization (the effectiveness of the corporate model) unites atheistic anti-globalists with religious activists, and the promotion of so-called "organic food" and the "return to the nature" links hard-line environmentalists with traditional farmers who act according to environmentalist principles unconsciously.

In a moderated perspective, except for radical proponents of progress in the extreme technocratic version, most people exhibit some Neo-Luddist qualities, while at the same time accepting a rationalistic interpretation of reality (e.g. the benefits of free internet access), and judge explicitly escapist attitudes as strange, atypical, or simply impractical. On a certain level of needs' satisfaction, the rational logic of action can transgress, although all institutional features of social subsystems are apparently preserved.

Human history has generally developed under stable, static, and progressive conditions in which changes to the natural environment, climate, or culture were so slow that the average person could include them in his or her habits or customs, and adapt to them economically and axiologically within a relatively stable instituFtional order and dominant mythology [cf. Napiórkowski 2014]. The popularity of Neo-Luddism can be framed as crossing a certain point, in which the modern is transformed into the provincial, the healthy into the harmful, the safe into the dangerous, etc. A simple example is a bicycle: a cheap means of transportation for the poor is for many urban dwellers an alternative to public transport, becoming at the same time a symbol of modernity and even status. The urban rationality of jogging, as a counterpoint to sedentary office work, for rural residents is a waste of the energy necessary for manual (paid or unpaid) work. In this light, the cultural dichotomy of urban/cosmopolitan vs rural/provincial is easily overcome with new technologies, while the differences in wealth do not automatically translate into different opportunities for mass consumption.

In the most general sense, Neo-Luddism is a (self)-reflective critique of a permanently transforming industrial civilization, with its "dehumanization" of production relations, urbanization, democratic inclusion, and axiological materialism. Neo-Luddism is different from previous forms of rejection of modernity because of the changes in labour relations and the increasing lack of consensus on what constitutes (paid, sensible) work and what poses a threat to employment. Today's techno-pessimists focus on the social consequences of scientific and technological progress, locating their main enemy both in technology *per se*, but also (more importantly) in ideas and social groups that introduce changes (rationalists, progressives, pragmatists, positivists, liberals), and in its beneficiaries (politicians, capitalists, the establishment, elites). Recognizing the negative relationship between certain socio-economic transformations and the development of science and technology leads some techno-pessimists towards adaptive rationality, but understood in a non-standard way: emotionally-pragmatically rather than logically-rationally. Facts are as useful as fake-news or myths when it comes to rebellion, opposition, rejection, disapproval, and even hatred directed

against ideas and people who are incomprehensibly and suspiciously different, threatening or unpredictable. In a word, Neo-Luddism serves as relief from the fear of the strange and the unknown.

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Maciej D. Kryszczuk
Michał Wenzel

NEO-LUDDYZM W PERSPEKTYWIE PRACY LUDZKIEJ: DZIŚ I JUTRO

Streszczenie

Neo-luddyzm wyrasta z przekonania, że współczesne społeczeństwa nie mogą zmienić (kapitalistycznego) podziału pracy i oficjalnych instytucji regulujących tę sferę. W artykule scharakteryzowano intelektualne źródła neo-luddyzmu, zaproponowano typologię i wskazano na jej konsekwencje dla badań współczesnych rynków pracy. Rozróżniamy cztery typy neo-luddyzmu. Ekonomiczni neo-luddyści (1) kierują się odruchami anty-libertariańskimi i opowiadają za reagraryzacją lub reindustrializacją, aby zapobiec bezrobociu i degradacji społeczności. Postawa ta wiąże się w sferze ekonomicznej z neo-luddyzmem romantyczno-pastoralnym (2), związanym z ruchami ekologicznymi kwestionującymi nowoczesną masową produkcję. Przejawia się on w modzie na wegetarianizm i naturalistyczny eskapizm. Odmiana pastoralna może mieć konotacje religijne. Ponadto wyróżniamy (3) neo-luddyzm duchowo-ideologiczny, który tworzą apologeci grup pierwotnych, takich jak rodzina, naród czy wspólnota religijna; nacisk na wydajność działalności gospodarczej proponują zastąpić wartościami poza ekonomicznymi związanymi z życiem zbiorowym lub samorozwojem osobistym. Charakteryzuje się sceptycyzmem wobec głównego nurtu nauki i techniki oraz, ogólnie rzecz biorąc, epistemologii materialistycznej. Osobnym wątkiem jest tak zwany neo-luddyzm anarchistyczny (4), który bezpośrednio czerpie inspirację z taktyki sabotażu stosowanej przez pierwotnych luddystów. Atakuje państwo, technologię i naukę (technosferę) metodami zapożyczonymi od „wroga". Jego przedstawicielami są np. anarchoprymitywiści, kulturowi sabotażyści, przedstawiciele kultury cyberpunkowej, hakerzy, itp.

Słowa kluczowe: neo-luddyzm, kapitalizm, podział pracy

RENATA DOPIERAŁA*
University of Lodz
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MINIMALISM – A NEW MODE OF CONSUMPTION?

Abstract

This article discusses minimalism as an example of anti-consumer-oriented social practices. The first section focuses on the assumptions of minimalism. The following parts refer to different variants of the relationship between minimalism and derivatives of consumption, i.e. anti-consumption and hyper-consumption (consumerism). The author also considers minimalism as a style of consumption and as a form of conscious consumption. The analysis is based on minimalist blogs and books.

Keywords: minimalism, consumption, consumerism, alternative forms of consumption

Minimalism is a lifestyle[1] that, according to its followers and some researchers, is characterized by an anti-consumerist approach combined with the demand for seeking meaning in life by means other than consumerism-oriented attitudes. Its main principle – "less is more" – is explained as "owning less" in order to achieve more in non-material aspects of life. Such a view of minimalism provides comprehensive instruments for carrying out life changes according to a specific pattern. These include: criticism of consumerism (excessive consumption); post-

* Dr, Faculty of Economics and Sociology, Institute of Sociology, Department of Sociology of Culture; renata_dopierala@poczta.onet.pl

[1] This is one of the many definitions of minimalism used primarily by its researchers. Other terms appearing both in texts authored by minimalists themselves and (less frequently) in the secondary literature include: idea, ideology, way of life, philosophy, way of thinking, doctrine, attitude, fashion, and way.

materialistic redirection of aspirations (discovery of "real" values) and methods of restructuring one's 'old lifestyle' (minimalism as a tool).

The article presents three intertwined issues. Firstly, it distinguishes the most commonly repeated practices making up the minimalist lifestyle. In this context, it refers to various perspectives of minimalism which illustrate the way it is understood (simultaneously, this allows to present its multi-threading). Secondly, it presents an interpretation of the anti-consumption orientation of minimalism; specifying what this turn, if it is real, consists in and how it is manifested. From this standpoint, it is also important to consider the relationship between minimalism and the dominating consumerism paradigm. Thirdly, based on earlier findings the article discusses the social and political potential of minimalism as a phenomenon associated with changes in the capitalist system. The framework for the considerations outlined in this manner is the concept of a consumer society [Baudrillard 2006, Bauman 2009, 2005].[2] Due to the widespread general knowledge of its main assumptions, it is not discussed in detail; rather only selected issues, significant for the main thesis of the paper, will be examined. The analysis is based on texts created by minimalists and on scientific discussions of the phenomenon.

MINIMALISM – INTRODUCTION

The life transformation proposed by minimalism begins with a recognition of what is unnecessary in life and getting rid of, limiting, or reducing reliance on such things. The next step is to identify what is important (this will be different for everyone). The discovery of what is 'excess' in the material sense (the redundancy of goods, objects), as opposed to what is in 'deficit' in the psycho-spiritual aspect seems to be the most important factor. It is difficult to unambiguously determine the difference between a consumption of 'proper size' (moderate?) and excessive consumption – there is no measure that would allow to estimate the exact volumes. It is rather a relative issue, and each individual 'casts the final vote' on what, in his or her opinion, is 'excessive'. The category of "excess", functioning in the concepts of a consumer society, proves useful; in this sense, excessive

[2] Zygmunt Bauman [2005: 23–24] writes that: "When we say that ours is a 'consumer society' we must have in mind something more than the trivial, ordinary and not particularly illuminating fact that all members of that society consume (to consume means using things up). (…) The way present-day society shapes its members is dictated first and foremost by the need to play the role of the consumer, and the norm our society holds up to its members is that of the ability and willingness to play it."

consumption has connotations similar to "superfluity" (excess of goods in relation to the necessities of life). The essence of minimalism is, therefore, a negation of ostentation, of compulsive, mindless purchasing, and a critical analysis of the quantities of objects owned together with the social meaning ascribed to them.

Becoming a minimalist and building and sustaining one's own self-definition is a process. What matters here is a search for moderation and balance (reasonable measure) to be found by each of us individually. Minimalism makes this explorations easier – it is primarily treated as a needed tool to accomplish the goals set by the individual. As emphasised in the posts published by minimalists on blogs and books, everyone understands them differently and chooses individually the corresponding elements and adapts them to their own needs. Minimalism is often combined with vegetarianism (and related variations), ecology, religious and spiritual practices etc., but they do not have to be practiced by every minimalist. Minimalism may correspond to the "zero waste" attitude (this would be a further step towards elimination of nonessential things). There is no contradiction between them – as part of limiting the resources owned, a minimalist may also strive to reduce the waste generated, based on a simple relation: the less I have, and process, the less waste I generate.

"Minimalism is not nor should it ever become a goal in itself, but merely a tool in pursuit of a goal. (...) *If we want to lead a simple, wise and harmonious life, we must understand which values are important to us because they lead us through life and everything else comes out of them.*" (emphasis by the author) [Kędzierska 2016: 21, 22]. This instrumental character of minimalism is particularly evident in the definition of Joshua Becker, according to whom it is "the intentional promotion of the things we most value and the removal of everything that distracts us from them" [Becker 2017: 28]. Joshua Fields Millburn and Ryan Nikodemus emphasise use of this tool – "minimalism is a tool to rid yourself of life's excess in favour of focusing on what is important – so you can find happiness, fulfillment, and freedom" [www.theminimalist.com/minimalism]. Important aspects in the declarations of the minimalists include, in addition to the quantitative aspect, the intentionality and voluntariness of actions.

Andrzej Kasperek [2014a, 2014b] sees minimalism as a "second wave", i.e. as a continuation of voluntary simplicity (voluntary simplification of life, simple life, simple living), albeit more trivialized, mostly by the Internet (as the medium in which the messages about it were initially produced). At the same time, he states that it is difficult to clearly indicate a boundary between voluntary simplicity and minimalism; some of its representatives equate these two phenomena and use these terms interchangeably, while others place them in a relational perspective, with

voluntary simplicity having a broader scope of meaning. Duan Elgin and Arnold Mitchell, the promoters of the Voluntary Simplicity Movement in the United States, embrace a simple life as "materially modest, but emotionally, intellectually and spiritually rich" [Elgin, Mitchell 1977: 5] . They created a set of values that form the core of existence marked by simplicity. These include: a human scale, self-determination, personal growth, ecological awareness, and material simplicity (a key aspect of the minimalist lifestyle) [Elgin, Mitchell 1977: 4]. Voluntary simplicity has a longer history (it reached its popularity in the 1970s),[3] whereas minimalism became popular after 2008,[4] as a result of the crisis in the capitalist system. However, it is becoming trivialized due to its frequent inclusion in self--help and quasi-therapeutic literature, as well as by an individualist culture that commands individuals to find an "autonomously" designed mode of fulfilment.[5]

Voluntary simplicity, as proposed by Samuel Alexander, is even closer to minimalism and the socio-cultural conditions in which it functions. He claims that: "Voluntary simplicity is an oppositional living strategy that rejects the high-consumption, materialistic lifestyles of consumer cultures and affirms what is often just called "the simple life" or "downshifting". Sometimes called "the quiet revolution", this approach to life involves providing for material needs as simply and directly as possible, minimizing expenditure on consumer goods and services, and directing progressively more time and energy towards pursuing non-materialistic sources of satisfaction and meaning" [Alexander 2011: 6]. The last element is crucial in the context of minimalism; it indicates a change of direction in the selection of consumed goods. Material values are replaced by post-materialist values, associated with the culture of self-expression (such as individualism, autonomy) [Inglehart 1990, 1997].

The studies to date have given rise to the common assumption that minimalism is multidimensional, internally inconsistent, and ephemeral. There is no one canonical version or existing definition of minimalism – each individual creates his/her unique set of beliefs and actions, which differ in their scope and intensity of change.

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[3] This does not mean that it only appeared then. Its antecedents can be found in ancient philosophy (in Stoicism, Epicureanism), Eastern religions (Buddhism, Taoism), and the views of American transcendentalists (Ralph Waldo Emerson and Henry David Thoreau).

[4] Minimalism is not an entirely new phenomenon. This term defines the currents in philosophy, art (mainly literature, painting and architecture) and linguistics.

[5] Some of the examples include texts published in Polish within the last three years: Babauta [2014]; Mularczyk-Meyer [2014, 2015]; Kędzierska [2016]; Jay [2016]; Becker [2017]; Sasaki [2017].

Minimalism can be seen from several points of view (they do not have to be disjointed), illustrating the complexity of the phenomenon:

1. As an example of an advisory and the therapeutic culture;
2. As a marketing trend, the elements of which are used in different aspects of life;
3. As an illustration of a new anti-consumerist spirituality [see Kasperek 2016];
4. As a style of consumption in which the quantity of possessions is limited, but they are still consumed by choosing products of higher value and quality or by focusing on non-material determinants of existence (experiences, emotions etc.);
5. As an alternative form of satisfying one's needs, which develops practices standing in opposition to excessive consumption.

Let us take a closer look at the last two points of view, which are to some extent mutually contradictory.

MINIMALISM AGAINST ANTI- AND HYPER-CONSUMPTION

The basic dimension that constitutes minimalism is the attitude towards consumption. Researchers describing and analyzing minimalism define it as an example of an "anti-consumerist protest" [Kasperek 2016] or a reaction to the "overabundance of excessive consumption" [Kramarczyk 2015]. Each of these attitudes illustrates different variants of the relationship between minimalism and consumption and its derivatives: anti-consumption (anti-consumerism) and hyper-consumption (excessive consumption). Let us now consider the links and relationships between them.

One minimalist declares: "It is sometimes said that minimalism is anti--consumerist. It is just as wrong as claiming that minimalists give up on possessions. (...) It is impossible to function normally in society and completely abandon material goods. We earn, we buy, we consume. What should be taken into account is proportion. Minimalists do not give up on consumption but they try to keep it within appropriate and reasonable limits. They reject greed and buying without thinking" [Mularczyk-Meyer 2014: 93]. This voice within the social world of minimalists questions treating it as a "totally" anti-consumption approach, pointing to its more nuanced determinants.

It is fundamental to redefine the approach towards consumption and things, and to give them new meanings. Francine Jay formulates such a mini-manifesto: "Becoming minimalists puts us in control of our stuff. (...) We declare independence from the tyranny of clutter" [Jay 2016: 11]. Therefore, it is about creating a distance from the belief that material goods are the basis for individual identi-

fication and perception by others. It is also wrong to think that they are determinants of social position and a means of satisfying the need for respect, prestige and recognition. They also should not be equated with gaining happiness and personal fulfilment. Contrary to the dominant consumerist ideology, minimalists declare that they do not concentrate on material objects. They are not interested in possessing, collecting, and accumulating things – they equate this way of life with a lifestyle of material frugality. One may ask: Why does the excess of things have negative aspects for individual identity and life? First of all, a person wastes time on activities connected with items like cleaning, ordering, securing, looking after and taking care of them, and wastes money on buying things owing to social coercion and cultural expectations. Spending most of one's time on earning money can lead to stress and burnout, and interfere with the balance between work and family life. Those who still want more are threatened by indebtedness.

For these reasons minimalism is about changing the status of objects in everyday live –"giving them their proper importance" [Kędzierska 2016: 36], and assigning them different meanings – "Treat them as tools, not goals in themselves" [Mularczyk-Meyer 2014: 56–57]. The attitude towards things presented by the minimalists results from the reversal of their basic characteristics, especially with respect to the consumer culture. But despite the declaration of minimalists that they do not pay attention to objects, they still play a huge role in their life. According to Marek Krajewski [2013: 80] "minimalists continue to be in the possession of things from which they want to liberate"; thus, these things continuously determine the manner of their actions, life goals, and the rules of conduct. Most activities and actions are connected with reflections about things. Paradoxically, while minimalists are identified by their attitude to the (lack of) material objects, such objects are all the time present in their life. As a result, it is crucial to determine the role of objects in the life of a minimalist, the status attached to them, and the perception of relationships with them.

Andrzej Kasperek [2016] considers the focus on things (as a dominant dimension) to be a vulgarized version of minimalism (which undoubtedly includes the media projects which aim to limiting the objects we possess to 100, 50 or even less). However, the relation to the material realm is an essential element in the identification of minimalists, and therefore is constitutive of the worldview and lifestyle associated with it. It is the basis for an approach to things that – according to minimalists – shapes a new perspective on our perception not only of ourselves, but also of the socio-cultural reality.

The assumptions of minimalism are in conflict with statements describing the consumer society. As Zygmunt Bauman demonstrates, in the consumer society,

"it is no coincidence that the pursuit of happiness (...) focuses not on producing things or appropriating (not to mention storing) them, but on throwing them out" [Bauman 2009: 44]; therefore, the dominant activity is collecting things and subsequently getting rid of them or replacing them with other objects. Moreover, happiness is not equated with satisfying needs (even if so, then only temporarily, since the state of insatiability is more functional), but rather with the continuous increase and intensification of desires and aspirations which are to be fulfilled thanks to the products offered (which equally quickly undergo devaluation). Consumption which is motivated by satisfying basic needs is ascribed with – in Bauman's opinion – "primitivism, immaturity, or exaggerated traditionalism (and remaining in a fundamental contradiction with happiness)" [Bauman 2009: 52]. Minimalists, however, use a different vision of "happiness" and the "good life", They do not associate it with participation and competition in consumption. This does not mean that material security does not have any meaning for them; on the contrary it is necessary in order to be a minimalist in the meaning described. Therefore, if one assumes that consumerism is the economy of excess and wastage based on irrationality (and not on calculation), and on creating desires and impulsive whims, then in this sense minimalism is definitely anti-consumerist.

MINIMALISM AS A STYLE OF CONSUMPTION

The redirection of one's orientations in life towards post-materialistic values justifies the examination of minimalism as an example of a new spirituality [Kasperek 2016, 2014a]. It is characterized not only by individualism, but at the same time by various forms of a non-obligatory sense of community, with emphasis on the temporal, non-religious forms of manifestation and pursuing the well-being of an individual. In relation to minimalism, this spirituality indicates the need for individual growth, internal self-improvement and "raising the consciousness to another level". A specific contradiction arises here. On one hand, Kasperek [2016] recognizes the dependency (or even correspondence) between the characteristics of this new spirituality and the attributes of the consumer society which contributed to its emergence. The growth of a culture of subjective well-being is an element of the "logic" of modern capitalism, which transforms not only experiences and observations, but also spirituality into goods confined within consumer activities, characterized by a decidedly commercial dimension. On the other hand, as the author states: "The essence of the minimalist spirituality is anti-consumerism and without a doubt it should not be treated as a pillar of consumer capitalism. Quite the opposite, the popularization of a simple, mini-

malist lifestyle would have to lead to questioning the imperatives governing the consumer society" [Kasperek 2016: 79].

One has to ponder whether this notion is justified. The fragments of statements from minimalists given above explicitly indicate the negation of this anti-consumer approach. What they emphasize is their opposition to the excess (*excessive* possession and consumption) and in turn place the emphasis on quality instead of quantity. Let's summon here another notion by one of the spokesmen of minimalism: "To live is to consume. We all need food and shelter and clothing. We also have passions and purposes that we desire to fulfill. These needs and these purposes require material goods. Minimalism does not reject all material purchases, but it provides the opportunity (and the desire) to own higher-quality items. In a minimalist economy, well-designed, multi-purpose, quality-crafted items will be desired and purchased" [www.becomingminimalist.com/minimalist-economy]. This high quality concerns multiple possibilities for the usage of items and devices, longer product life (increased durability), with a focus on the materials applied and the way a given item was made. The selection of such products is thus a consumer strategy, standing in opposition to the acquisition of mass-produced, cheap and low quality goods. As Marta Skowrońska notes: "The reduction and selection of items in many cases leads to selection of the most effective, functional, aesthetically pleasing, space-saving and lightest items, which usually denotes high priced products of well-known brands" [Skowrońska 2013: 91]. This confirms the associations between minimalism and the capitalist economy and how the latter is embedded in the minimalist reality.

Interpreted from this standpoint, minimalism depicts (only?) reorientations of individual choices, which fits into the phenomenon of downshifting. In this case, money is still spent, but it is allocated for other types of goods than strictly material ones: travel, tourism, art, which in principle is aimed at providing equally high quality and valuable experiences from the perspective of self-realization of the individual. Equally important and pronounced is the assumption that we have the resources necessary to realize our goals. What's more, these behaviours reflect the characteristics of an advisory and therapeutic culture[6] [see Jacyno

[6] Minimalism promotes activities supporting individuals in dealing with their lives, making decisions and choices which are aimed at improving the quality of life. The range of pieces of advice provided by minimalists is wide and includes: nutrition (eating habits, diets, meal preparation), travelling and moving, management of things (DIY, locality, seasonality), organization of domestic space (amount and type of furniture, arrangement, souvenirs), owned things, objects (what, which, how many?), hygiene (beauty treatments, the use of natural cosmetics), use of technical equipment, leisure activities, personal development (development of passions, interests, time for oneself),

2007]. The exchange of objects – characteristic for this moderate form of minimalism – does not entail a change in their function in the life of an individual [see: Krajewski 2014, Górnik-Durose 2002].[7] Their role remains the same, i.e. they are still symbols of consumption. Amitai Etzioni writes: "To those who are wealthy, rejecting the symbols of success is acceptable only so long as you can display the objects of poverty in a way that makes it clear you are just rolling in dough" [Etzioni 1998: 621]. The "poverty" is imaginary in this context; an example of such a strategy is *poor chic*[8] [Raciniewska 2013].

Therefore, if the high quality of goods and its primacy over quantity is important, is it not polemical to state that "minimalism is not a turn towards the luxurious" [Kramarczyk 2015: 48]. This aspect is emphasized mainly by the critics of minimalism, who point out that it signifies a form of ostentation. This is illustrated for instance by the "media" minimalist Dominique Loreau, whose attitude is often criticized within the realm of the social world of minimalists. She is a representative of "luxurious" (sublime) minimalism, which is an example of "practices of high status" [see Duda 2013]. This is not directly contradictory to the common mass worldview, but becomes a main factor in defining the social status and determining the prestige of an individual. From this standpoint, the type of "contestation" proposed by minimalism is as equally commercialized as other forms of rebellion, opposition and resistance to dominant practices. As proven by Jean Baudrillard, "sub-consumption" and "inconspicuous consumption" do not manifest themselves through "ostentation" (Veblen's "conspicuous consumption"), but rather through discretion, restraint, and voluntary self-sacrifice, which are nothing else but an additional market, a luxury on a higher plane, an

relationships with others (how to build satisfying relationships and how to separate oneself from others), and education. "Individual experts", people publicly associated with minimalism may play the role of advisers in creating a minimalist, yet good life, including "collectives" – users of blogs, forums dedicated to minimalism, people who formulate recommendations that are useful to others.

[7] Małgorzata Górnik-Durose [2002: 73–77] indicates two main functions of things: instrumental and symbolic. Within the first we can distinguish the following "sub-functions": utilitarian, hedonistic, interpersonal, economic (securing) and exploratory (cognitive); and within the second: expressive, sentimental (retrospective) and social (prestigious). At the same time, the author notes that "in terms of the consumption culture, the perspective of needs and their motivational role does not appear to be sufficient to answer the question of why we really need material goods. The analysis of these needs leads to enumerating more categories and creating new classifications, with full awareness that many of these needs can be met without material goods". [Górnik-Durose 2002: 73].

[8] *Poor chic* encompasses a variety of fashions and aesthetics, whose common feature is *poverty-like* styling, treating poverty as a form of entertainment and referring to symbols identified with low social status and the *underclass* [Raciniewska 2014: 89 et seq.].

expression of even more pronounced conspicuousness, which transforms itself into its antithesis and thus is an even more subtle difference. Therefore, while the differentiation might take the form of renouncing items and "consumption", it still is nothing other than consumption in its purest form" [Baudrillard 2006: 108].

The publicist Chelsea Fagan points out another aspect. Assuming that minimalism is a reaction (or an answer) to the hyper-consumerism of late capitalism, then it would have a distinct "bricolage" feel, corresponding to the individualistic, pluralized and highly psychological character of modern culture, i.e. "minimalism as a secular kind of religion, an add-on to the cultures of yoga and green juices and general living well by putting together a tapas platter of cultural and spiritual practices without ever fully committing to one" [Fagan 2017]. The author considers the call for more conscious and ethical purchases quite poignant, but notes the rare reflections among minimalists on, among other things, issues related to social inequalities (minimalism would thus fit into the neo-liberal vision of social order). This does not signify that themes critical of the consumer society are altogether non-existent in minimalism. They concern the excessive production of objects, manipulative marketing and advertising activities, lack of awareness of the damaging effects of overconsumption, the creation of false needs, exploitation of natural resources and environmental pollution, globalisation, competition rather than cooperation, and the priority given to private property and individual benefits. There is however a distinct lack of deeper diagnoses and complex visions of social change (this is discussed more in later sections of this text). Continuing her deliberations, the author observes that: "Very few of these minimalist troubadours ever really take things to an economic or class-based argument. It's about reducing for personal enlightenment and pompous blog posts; it's not about arguing for a more equitable society in which people consume proportionate to their needs. (If you need a perfect example of this, note the fetishization of the curated "simplicity" of the ultra-rich: their clean loft spaces, their designer capsule wardrobes, their elaborately reduced diets). These people are still conspicuously consuming in mind-boggling ways, they're just filtering it through the convenient prism of simplicity, and that allows their million-dollar wardrobes to somehow be aspirational for someone advocating for "minimalism" [Fagan 2017]. This minimalistic "quasi anti-consumerism" and "quasi anti-materialism" is thus determined by class and is an indicator of high status and a sign of distancing oneself, in accordance with the Baudrillard's depictions of "inconspicuous consumption".

Minimalism is a lifestyle associated mainly with the middle and upper class. Minimalists are usually individuals with an established material and professional

situation who can afford – having satisfied their vital living needs – to achieve post-materialistic aspirations. Minimalism is, thus, an ideology (according to its critics just another marketing trend) consisting of choosing "not having" and not identifying oneself through material goods. In the case of those in worse material situations (which is not necessarily tantamount to the lower class), it is not a choice but rather a necessity – their limited financial resources force them to take on a limitation-based attitude and search for alternative solutions for satisfying their needs. Therefore, the meaning of 'prosumer practices' and strategies of processing things is different for these groups – they are a non-problematic form of resourcefulness which, in the case of those in a better material situation, is a form of differentiation and, at the same time, a manifestation of their individual disagreement with the rules of the capitalist system.

MINIMALISM AS A FORM OF CONSCIOUS CONSUMPTION

As was stated earlier "minimalism is not a full retreat from consumerism or an anti-consumption behavior, but rather a form of a conscious choice, which helps the individual to achieve balance and better quality in the everyday life" [Kramarczyk 2015: 283]. So it is worthwhile asking: What beliefs and actions constitute this conscious attitude towards consumption?

It is based mainly on restricting and reducing the excessive amount of gathered goods ("inventory" lists can be helpful) and subsequent reflection on purchases (e.g. by asking oneself the following question: "Do I really need this?"). The goal is to possess necessary things which are actually utilized, and to skilfully manage such items. It is necessary to discard items which are unused, unhelpful, or non-functional, and retain only those things which are necessary, beneficial and memorable. There are various strategies intended to gain and maintain this control: donating the unnecessary items to individuals or institutions in need; selling them (e.g. via the Internet); exchanging with others (for example mutual borrowing of rarely used devices that are not needed at home); replacing old things with new things (in the sense of eliminating, for example, two older things by one new item); evaluating their usefulness (do we really need this device? can we replace it?); utilizing used items; fixing things (individually or using local services); not wasting things (especially food); and not attaching oneself to things.

Examined from this perspective, minimalism fits into the cooperative economy, which changes the processes of organization and distribution of products towards the creation of networks of individuals and communities which provide mutual services, and co-create and share goods. Such an economy is based on

values and motivations declared as important for minimalists: helping others and sharing our time and resources, which can be reciprocated in either a material or non-material way. In this economic model, competition between producers is supplanted by cooperation between prosumers and consumers. Its growth became possible thanks to new technologies ensuring the creation of horizontal, direct relations, offering numerous platforms making it possible to link tenderers with purchasers without the participation of a third-party or central organization. Similarly as in the case of minimalism, the popularization of economy of cooperation was fuelled by the financial crisis in 2008 (which contributed to the necessity to restrict expenses, better usage of resources, and changes in social relations).

The economy of cooperation (also known as the sharing economy or collaborative economy) is based on the notion that "access is better than ownership." It is based on notions strictly corresponding with the views of minimalists on the role of possessions in our everyday life – individuals do not want to, do not have to, or cannot afford to have all the items, many of which are not used by them. This principle is applied especially to situations where possession: is not treated as an autotelic value (i.e. status is not built on its basis, or there is no sentimental value attached to items), but instead treated as a means to attain goals (this concerns, for example, equipment used to make renovations); or where being in possession of an item exceeds the financial capabilities of an individual; or it is not economically justified (we use something very rarely); or the usage of an item is associated with large maintenance costs and is time consuming. This form of economy is an alternative to the "reduce, reuse, recycle, and repair" principle.

A reflective approach to consumption assumes saving time and money (restriction of unnecessary expenses, thoughtful and planned purchases of what is needed at the moment, not undertaking excessive financial obligations), buying local and seasonal items, paying attention to products' composition, their origin and execution (a high importance is attributed to durability and reliability). Such activities are characteristic not only of minimalists – they are also associated with the level of wealth of an individual and his or her social level. In societies located higher on the prosperity scale, it is not so much the (low) price which ultimately determines consumer choices, but most of all other (quality) parameters of the offered goods.

The phenomenon of conscious consumption, together with a form of resistance towards dominant consumer behaviors, is also supporting the movement towards indigenous and local manufacturing, searching for information regarding the structure of ownership of companies and their "reputation", avoiding (often

ignoring) the products of global corporations. Another factor intertwined with the minimalist way of life and consumption is the differentiation between needs (real and specific) and whims and impulses, which individuals should restrict and ultimately eliminate (they distract and prevent the achievement of the desired mindfulness). Prosumption, that is individually producing and fulfilling needs and where possible avoiding paid services, e.g. in the preparation of products, baking bread, vegetable growing, embroidery, knitting, sewing of clothes etc. is popular among minimalists. The narrative interviews conducted by Justyna Kramarczyk suggest that the obtained goods, beside having pragmatic and identity values (a feeling of agency, satisfaction, and an opportunity for self-realization) are a "guarantee that the whole process of creating a product proceeded in accordance with defined and usually known criteria and also that the final product is more personalized in terms of consumer expectations" [Kramarczyk 2015: 282]. This statement may be seen as a confirmation of the class determinant of minimalist practices – another form of differentiation, but also the individualization of consumer activities ("personalization"). As a result of the sharing economy, it is possible to make incidental or even more permanent contacts, e.g. neighborly contacts, within the scope of cooperatives which allow for the exchange of "non-market" goods and services. Naturally, the popularity of hand-made products [see Olechnicki 2017] is not a sole domain of minimalists; however in their case it coincides with the worldview which they propagate (combined or reinforced by, for example, an interest in ecology).

THE SOCIAL AND POLITICAL POTENTIAL OF MINIMALISM

In describing minimalism as a "spirituality of inner peace" Kasperek [2016] recognizes that besides "the search for inner balance" a mode of social life is also involved, in which "cooperation, compassion, and kindness are propagated and there is no place for competition, which is the driving force of the consumer capitalism" [Kasperek 2016: 79]. Thus we can ask the following questions: Does minimalism offer an alternative vision of social organization? Can the emphasis on post-materialistic attitudes be the foundation of a new axio-normative order? And is it conducive to building community and establishing strong social bonds based on the aforementioned values?

In this regard, one should refer to the concept of voluntary simplicity, which shares some things in common with minimalism. Some of the researchers of the Voluntary Simplicity Movement perceive it as an alternative to the alienation tendencies of the modern world. This results from the significance that can

be assigned to relationships with others, involvement in political issues, and a greater sensitivity to social issues. But even in this case discrepancies can be noted. Critics point out the way voluntary simplicity separates individuals from the society, arguing that too much emphasis is put on the individual and his or her closest circle, and therefore the movement can be considered not only isolating but also apolitical. Thus, there is no simple transference from the level of strong primordial relationships to ones defined by more community and association-based characteristics. Let us take a closer look at the writings of one of the enthusiasts of the simple life on the 'common good' as an element of the "minimalist economy": "This represents the greatest benefit of minimalism on the macro-level. Minimalism provides an opportunity for the individual to practice generosity on a larger scale than ever before. Minimalism allows us to redirect our finite resources away from *our wants* and begin to use them in practical ways to meet *other people's needs*. Whether we are feeding the hungry, housing the orphan, saving the environment, protecting animals, or speaking up for the disenfranchised, our resources can make this world a better place for everybody" [www.becomingminimalist.com/minimalist-economy]. Without doubt the dominant feature of this statement is the utopian nature of the outlined vision, not taking into account the economic, political, and cultural conditions which determine the capitalist social system. In addition, the individualistic approach is quite vivid, which is rather contradictory to the proposed community--oriented approach of individual actions. In another excerpt the author directly indicates that lowering the amount of money allocated for buying items and the time devoted to engaging with them allows us to take care of our own health, mental well-being, and productivity. It should be noted that some critics argue that voluntary simplicity offers a narrow hedonism, as it is reserved for a small number of privileged individuals and, due to its very nature, is professed and practiced mainly by those who can easily regulate the material levels of their lives.

Mary Grigsby observes that the members of the voluntary simplicity movement "rarely undertake political initiatives, instead focusing mainly on individual actions as the main mechanism of change" [Grigsby 2004: 9]. Their demands, which largely concern criticism of the capitalist system, could be implemented but would require the politicization of their actions. This indicates that the efforts to reform the system cannot be restricted to individual transformations. There is a need to include grass-roots and bottom up mechanisms to change top-down policies. The question thus arises: Is it even possible to talk about a social movement within the context of the simple life? According to the Grigsby, it is

at most a "loosely connected" movement, characterized more by cultural than social aspects.

Grigsby's diagnosis also concerns minimalism. It can be problematic to define it in terms of a social movement, but at the same time one of the characteristics of the new social movements, which can be also traced to minimalist practices, should be noted. This characteristic is the constant blurring of the line between the public role and the private role. By overlapping and intermingling the two dimensions, a specific form of subculture is born [Della Porta, Diani 2009]. There is no distinction between actions for the universal, common good and the self-realization sphere (purchase of goods at local retailers not only restricts the revenue of corporations but also builds individual and social identity). The question which remains is whether and to what degree the aforementioned actions might lead to a real change of the social system. They result – at least in the subjective opinion – in gaining independence from the market and corporations, and in care for the environment and sustainable development (local actions emerge as an alternative to neoliberal, globalisation patterns). These attitudes do not downplay the importance of market mechanisms in general; products of natural origin and ecological products are, after all, subject to the same economic laws as other products.

CONCLUSIONS

It is safe to assume that minimalism is characterized by ambivalence. On one hand it is a negation of hyper-consumption – "Minimalism is the opposite of excess, namely wastage" [Kędzierska 2016: 52], "It is not about a revolution nor sacrifices, but rationalizing the state of our assets and the level of consumption" [Mularczyk-Meyer 2014: 64]. On the other hand it remains in the realm of consumer logic, with the vector shifting towards high quality goods, experiences, and sensations. It is at the same time a "distinction in the world of excess, but also a strategy for the time of crisis" [Skowrońska 2013: 90]. Minimalism is varied and multifaceted. For some, it is a superficial, fleeting fad, while for others it is a form of distinctive consumer behaviour, and for a specific part of population it constitutes an internalized system of beliefs embedded in the values of voluntary simplicity. By referencing the phraseology applied in minimalism we can define it as a multifunctional tool, which is useful in modern, complex societies.

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Renata Dopierała

MINIMALIZM – NOWY STYL KONSUMPCJI?

Streszczenie

W artykule omówiono minimalizm jako przykład antykonsumpcjonistycznie zorientowanych praktyk społecznych. W pierwszej części autor prezentuje główne założenia minimalizmu. W kolejnych punktach analizuje różne warianty relacji między minimalizmem a pochodnymi konsumpcji: antykonsumpcją i hiperkonsumpcją. Autor rozważa również minimalizm jako styl dyskretnej konsumpcji oraz jako formę świadomej konsumpcji. Podstawą analiz są książki i blogi pisane przez minimalistów.

Słowa kluczowe: minimalizm, konsumpcja, konsumeryzm, alternatywne formy konsumpcji

ELŻBIETA NIEROBA*
University of Opole
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MUSEUMS AS PARTICIPANTS IN THE MARKET GAME: THE POLITICAL AND ECONOMIC CONTEXT OF THE FUNCTIONING OF THE MUSEUMS

Abstract

Under the influence of contemporary social and political changes, which have resulted in, *inter alia*, changes in the structure of museum audiences and their expectations, museums have had to implement new practices and tools which were previously not present in their fields of interest. These processes changed the definition of the mission of a contemporary museum and the way of communicating with participants of culture. Today a museum, like every other institution on the entertainment and leisure market, has to attract recipients of its offer. Museums thus engage in ever more close relationships with the field of economy. Moreover, the model of public financing of culture subjects the activities of museums to the current politics. This article discusses the 'spilling over' of the principles of the fields of economy and politics into the field of museums.

The empirical material collected during the realization of qualitative studies among museum employees concerning their attitude towards the changes taking place in the sphere of museums, both in Poland and all over the world, provided the inspiration to analyse this issue. The following issues, taken from a wide range of issues related to the assessment of the museums' place in the market reality, are examined in this article: sources of cultural and economic values generated by museums; the phenomenon of competition between museums; museum attendance as a criterion of the museums' success; and the required models of financing museums' activity.

* Dr, Department of Social and Marketing Research, Institute of Sociology; e-mail: enieroba@uni.opole.pl, panagia@poczta.fm

Theoretical considerations concerning relationship between the necessity of fulfilling museums' social mission and the expected economic efficacy, as well as the museum's status among other players on the leisure and entertainment market, were enriched by selected research results, which are treated as a local (Polish) commentary on the global changes taking place in the operation of contemporary museums.

Keywords: museum, Pierre Bourdieu, qualitative research, economic viability of the museum, superstar museums, blockbuster

INTRODUCTION

This article focuses on the 'spilling over' of principles in the fields of economy and politics into the field of museums. This subject is very wide and thus I do not undertake a complete exploration of the whole phenomenon, but instead focus on a few key indicators which will make it possible to reconstruct the strength of the relationship between the economy and culture, as well as look carefully at the possibilities of preserving the autonomy of a museum in cases of the entanglement of power and politics into the activity of museums. It is necessary to add here that these possibilities are largely dependent on the specificity of a given museum – its way of financing, geographical location, kind of collections, etc.

Museums have been subject to a continuous evolution since their foundation. Today, museums have to implement new practices and tools which have not previously been within their sphere of interests. This resulted from social and political changes which entail, *inter alia*, a change in the structure of museum visitors and their demands. These processes have redefined the mission of a contemporary museum and its way of communicating with participants of culture – a museum, as every other institution on the leisure market, has to attain recipients of its offer. Thus, museums develop close relationships with the fields of economics and the economy. Moreover, the model of public financing of culture subjects the actions of museums to current politics. However, it is worth remembering that institutions like museums have never been apolitical, which was proven by, among others, Carol Duncan and Alan Wallach [Duncan, Wallach 1980, Duncan 2006], who indicated that a museum is a symbol of official power, as well as by researchers inspired by Michel Foucault, who highlighted the significance of a museum in the process of classification and organization of knowledge, production of ideology, and social disciplining [Hooper-Greenhill 2003, Bennett 1995, 2005, 2006].

What's more, the paradigm of the New Museology also exposes the inability to avoid the political context in everyday practice, and it demonstrates that culture is an area where numerous – sometimes contradictory – groups of interest often clash [Witcomb 2003, Marstine 2006, Hooper-Greenhill 2007].

The process of forming high culture as reconstructed by Paul DiMaggio in the 19th century in Boston, one of the most active cultural centres in the USA, provides an interesting example of an attempt to separate art from politics. The urban elite, descendants of British protestants who used art to protect their status as a dominant group, played a key role in this process. Supporting art by means of non-profit organizations, they totally controlled the production and distribution of culture and could decide on the final look of "their" institutions of culture. DiMaggio calls them cultural capitalists, as they had an opportunity to finance enterprises which were non-profit by definition. Two of the most important institutions where the cultural activity of the Boston elite was focused are the still existing Museum of Fine Arts (opened to the public in 1876) and the Boston Symphonic Orchestra (founded in 1881). Basing their activities on private capital made it possible to undertake autonomous decisions, free from any interference of the authorities or the free market mechanisms on which profit-making companies operating in the entertainment sector were dependent. Their guardianship over high-brow culture institutions ensured that the financial elite would maintain their dominant economic and political position in the society, which means that art was used in political games as a tool of legitimizing hegemony. In such a situation it was not possible to talk about autonomy of the field of art [DiMaggio 1986].

The direct inspiration for this paper came from the empirical material collected during the realization of qualitative studies among museum employees about their attitude towards the process of changes which are taking place in museums, both in Poland and all over the world. [1] The issues chosen – from a wide range of issues included in the research – are related to the assessment of museums' location in the market reality; the sources of cultural and economic values generated by museums; the phenomenon of competition between museums; attendance as a criterion of museums' success; and the demands of the models of financing museums' activity.

When analysing Polish public museums in the context of world museology, it is necessary to bear in mind their specific way of functioning as well as the changes inaugurated in 1989, when the centralized monopoly over the support

[1] Detailed conclusions from the research are presented in the book entitled „Pomiędzy dobrem wspólnym a elitarnością. Współczesny model muzeum" [2016].

of cultural life started to lose its significance, which was a breakthrough not only for the world of culture. Over the next few years, most museums were transferred to local authorities. The move away from the paradigm of centralized support of culture, and the accompanying changes in the model of financing museums, as well as the commercialization of their cultural offer and the necessity to attract visitors have created a major challenge for Polish museums; one which western museums have been dealing with for some time now.

RESEARCH METHODOLOGY

The theoretical perspective concerning the relations of museums with the fields of politics and the economy will be supported with selected results from the qualitative research project which I carried out in 13 Polish museums. In each institution I interviewed the manager of a given museum as well as museum employees who had no managerial functions, as I assumed that the place which a respondent occupies in the organizational structure can have an influence on his or her evaluation of the situation in the museum. My respondents in the second group consisted only of research program coordinators employed in positions connected with the basic activity of the museum. Conducting a research project taking into account other positions (such as, e.g., the promotion department) could result in obtaining different opinions.[2] According to Pierre Bourdieu's theory of the field, I assumed that there are various players in the field of museums who fight in order to gain a symbolic advantage over other participants of the game, and I assumed that some features of museums would increase or decrease the chances for the possibility to determine and setting the borders of the field [Bourdieu 2007, Bourdieu, Wacquant 2001]. The starting point for choosing museums for analysis was the division of museums into three layers – national museums, historical museums (including municipal/local museums, museums of martyrdom, biographic museums) as well as museums of contemporary/modern art.[3] Then, inside each layer, I chose museums which are different from one another as regards

[2] This group, according to the Act on Museums as of 1996, Article 32.1, includes employees "on posts where tasks connected with the following activities are fulfilled: 1. gathering and scientific elaboration of collections; 2. arranging exhibitions and making the collections available for educational and scientific purposes; 3. organizing research and scientific expeditions, including archaeological ones; 4. conducting educational, artistic, culture promoting and publishing activity."

[3] I use both terms "modern art" and "contemporary art", as both these terms are used in the names connected with Polish museology.

the nature of their collections[4], period of operation[5], location in the centre or in the suburbs of the museum field[6], and operating entity (public museums were the subject of my interest[7]). My hypothesis assumed that museums differ from one another in their degree and possibilities of adapting to the changing social and cultural context. From the statistical point of view, the ways of choosing people for the research and their number in the qualitative research do not meet the criterion of representativeness. However, the cases chosen for the purpose of the research represent "the relevance of the phenomenon we want to study in our research participants` experience and concerns with this phenomenon" [Flick 2010: 61].

The research project concerned the museums' attempt to confront the diagnosis of Zygmunt Bauman concerning the inevitability of "compulsive, obsessive changing." Do museums have to be in a "constant movement" according to the phrase "You modernize yourself or disappear"? [Bauman 2004: 42]. To what degree are we talking about the twilight of a traditional model of a museum – such a museum which tries to remain independent of recipients' influences and free market mechanisms? Issues which were investigated in the research concerned, *inter alia*, such issues as: ways of defining the museum; key tasks which each museum should fulfil; the status of recipients (whether they are active participants of culture or passive recipients of the museum's offer); the place of education in the museum's activity; opportunities for and threats to the museum's development; and characteristics of museum employees and their relations with other actors of the museum field.

Theoretical considerations concerning relations between the necessity of fulfilling the social mission and the expected economic efficiency, as well as the

[4] The research sample included 3 art museums, 3 historical museums, and 7 museums having heterogeneous collections.

[5] The literature on the subject states that the cut-off date of the so-called 'museum boom', i.e. the investment boom in the scope of museums is the date of opening the Warsaw Uprising Museum in 2004. Such a date was adopted by me for dividing museums into those operating for a relatively short period of time (i.e. founded after 2004), and those with a long history. The research sample included 2 and 11 of each, respectively.

[6] I considered that museums, the headquarters of which are located in big cities – capitals of provinces commonly known as centres of cultural life (Warsaw, Wrocław, Poznań, Kraków, Gdańsk) operate in the centre of the artistic field, whereas the others operate in the suburbs; thus 7 museums chosen for the research represent the centre, and 6 represent the suburbs.

[7] Museums subject to the Minister of Culture and National Heritage (national institutions), local museums (founded by local government units), co-run museums (run by local governments and the state) and museums founded by legal entities were chosen to take part in the research. There were 4, 5, 3, and 1 of them, respectively.

museum's status among other players on the leisure and entertainment market, as presented in the further part of the article, were enriched by selected research results, which were treated as a local (Polish) comment on the ongoing global changes in museums' operations.

SOCIAL MISSION *VS* ECONOMIC VIABILITY OF THE MUSEUM

According to Matt Gerald [2006: 1], contemporary museums do not operate according to permanent structures of a bourgeois process of education based on unchangeable social foundations. In practice, this means that museums have to find the proper balance between fulfilling their mission and meeting expectations of the society – as well as performing the tasks resulting, in the Polish context, from the Act on Museums as of 1996 – and their financial operations. On the one hand, the requirements with respect to the social functions of museums are constantly increasing. The duty of museums is not only working with a collection (gathering, protecting, and showing). They are also expected to take social responsibility, i.e. be sensitive to social issues so that they could become a tool in the struggle against social exclusion (in its cultural, economic, social, and political dimensions), to build social capital and foster the development of communities. Peter Dahlgren and Joke Hermes [2015: 8–10] claim that the fundamental mission of public museums in democratic societies should be supporting, protecting and increasing the influence of democratic systems. However, according to the assumptions of the new ethics of museums by Janet Marstine – museums should support the construction of a fairer society [Marstine 2011]. On the other hand, according to Monika Murzyn-Kupisz, "there is often an increasing emphasis on the part of public authorities and other ownership and museum financing bodies on the short-term economic viability of museums, meaning the elaboration of a museum's own income and attracting private financing" [Murzyn-Kupisz 2016: 12–13]. According to practitioners, the economic debate on museology concentrates on the analysis of costs and profits. The dominance of the problem of economic viability means an acceptance of the statement that "museums fulfill their mission best when they boost the economy effectively with the lowest cost to the budget at the same time. The subject of museums is reduced to the issue of savings, which can be caused by the change of rules of functioning of this institution and the profits which it can generate more or less directly" [Suchan 2011: 50]. An oversimplification of the economy can, according to Suchan, be dangerous for the identity of museums [Suchan 2011: 51]. The respondents in my survey also negatively evaluated the connections of museums with the economy.

When asked about the greatest opportunities and threats, the respondents spontaneously indicated three areas. The first was the instrumental use of museums in economic policy (a museum as a tourist attraction); the second the low level of recipients of the cultural offer and the development of the leisure sector at the same time and thirdly technical and organizational issues (e.g. problems with adjusting the infrastructure of museums to temporary exhibitions). The fact that when answering the question concerning the opportunities and dangers facing museums, respondents focused only on the second issue testifies to a generally critical assessment of the conditions in which the museums operate. Moreover, the problems indicated by them concern the penetration of rules of the economy into the world of museums. In view of the presented answers, it is visible that the respondents have made efforts to keep the furthest distance possible from issues relating to the economy and free market. However, it is also obvious that they are rooted in the economic realities, which is visible among others by loanwords. Respondents discussing different topics talked about *the necessity of building a recognizable brand* (S, the Museum of Martyrdom[8]), *treating monuments as goods* (M, the Regional Museum), *image duties* (S, the Modern Art Museum), *attractiveness of the offer* (S, the National Museum), *the profiles of the offer's recipients* and *image studies* (M, the Regional Museum) or the necessity of *putting emphasis on marketing activity* (S, the Regional Museum).

The connection with the economy can be treated from a broader perspective, not only from the point of view of costs and profits, especially if we take into account museums financed by public authorities. Above all, it is worth analysing separately the cultural and economic values generated by museums. Such an approach makes it possible to clearly define the potential influence of museums on the economy and society.

According to Throsby, the sources of cultural values connected with the museum are in the works of art and the institution itself – the museum [Throsby 2010: 47]. It is possible to assign the following cultural values to works of art: aesthetic value, for example beauty, harmony, form; spiritual value. i.e. a collection of cultural meanings essential for a certain group of people; social value, which builds the sense of identity; a historical value, which strengthens the feeling of continuity with the past; a symbolic value, which is the sense hidden in works of art; and the value of authenticity in the originality of objects [Throsby 2010:

[8] In order to maintain full anonymity of the respondents, when citing their answers I provide only the place in the organizational structure of the museum (M – a managing person, S – a substantive employee), and in parentheses the type of museum which they represent.

39–40]. According to respondents, the gathered collections of works of art are the *raison d`etre* of the museum and are called 'national goods', 'goods of culture' or 'artistic treasures'. Although managing the collection is a significant burden for the institution, the respondents acknowledge that a museum is reliable only when *actors in its tale are authentic witnesses from the past* (M, the City Museum). A collection is proof that a museum is trusted by citizens and can fulfil the role of a depositary of these valuable objects. The second source of cultural values are institutions because, according to Throsby "a museum of art creates cultural value also by the sheer fact of its existence and operation as an institution" [Throsby 2010: 48]. This value is reduced to the role which a museum plays as an element of the public sphere, for example by building the area for discussion about socially significant issues. The respondents also highlight the role of a museum in initiating dialogue and relationships between bodies differently engaged in the life of a museum (both tourists and art lovers are museum visitors).

The economic value of a museum is composed of practical values (direct and indirect) as well as non-use values [Murzyn-Kupisz 2016: 105]. Direct economic values include the valuation of fixed assets of museums, i.e. the building and what is inside it as well as its services. According to Murzyn-Kupisz, the last category includes, apart from the income from the sale of tickets and services such as the services of guides and educational or catering services, the income from the use of the museum's brand [Murzyn-Kupisz 2016: 102]. According to respondents, the positive associations with the term "museum" lead to the taking of this name by institutions which do not possess their own collections, and compensate for this lack by rich scenography, copies of artefacts and multimedia. An additional attraction is the possibility of touching exhibited objects by visitors. New places which are also called museums are often of a commercial character, and impose rules which are binding in the field of economy. However, according to results of deep economic analyses, the field of a museum is not an autonomous field and although museums act as non-profit institutions, they have a large influence on different markets and sectors. For example, museums form the art market by defining which artefacts are valuable, thus influencing the demand [Murzyn-Kupisz 2016: 103]. Suchan, in the context of contemporary art, highlights that contact with it has a positive influence on "the development of our abilities to think in a creative way, skills of acting in the contemporary communication area, openness to what is different, flexibility and readiness to adopt new patterns and models of life, etc." [Suchan 2011: 54]. These are features which are hard to value measurably. However, they are important for the modern economy, coming into a phase of a cognitive capitalism [Suchan 2011: 54].

There are three types of non-use economic values – option value, bequest value, and existence value [Murzyn-Kupisz 2016: 104–105] – which can be defined as potential values. The significance of the option value is based on the assumption that a museum can be visited at any time – in a close but undefined future. The bequest value is based on maintaining the experience of continuity. The feeling of continuity is an important foundation for forming identity, particularly "in an unstable world of liquid modernity, in which forms hardly ever keep their shape for as long as they could build trust" [Bauman 2003: 113]. The awareness of lengthy duration and a common history makes an individual and the community feel more appreciated; after all everything which has a past, has also more value in the public reception. Collections in museums are a tangible proof of continuity of the history of a given community and they implement collective memory, giving meaning to a wider group, a sense of stability, and setting the borders between us and them and those with a cultural identity. Museum institutions were started in order to, *inter alia*, archive and protect objects which, according to a given community, are worth saving from lapsing into time and will uphold the social memory [Popczyk 2008: 37]. This remark leads us to the last kind of non-use value, i.e. the existence of value which makes entities "feel satisfaction due to the sheer existence of a museum as a part of the cultural landscape of a given place" [Murzyn-Kupisz 2016: 105].

If we assume, as Throsby does, that museums provide services having the character of public goods [Throsby 2010: 46–47], we have to state that taking into account only the current financial information of museums gives us a limited insight into the economic aspects of these institutions' operation. The perspective of a culture economy can be an effective tool supporting museum management if it is used for overcoming obstacles and solving problems which make performance of the social mission more difficult [Suchan 2011: 52]. Economic analyses can be useful concerning the issue of demand for services rendered by museums, and its determinant – the supply of museums and their services – as well as public policy towards museums and the influence of museums on the local and regional development. In view of these facts, it is obvious that the economy of culture is complementary to other social and humanist concepts used in the analysis of museum practices [Murzyn-Kupisz 2016: 38–39]. However, the number of publications concerning the relationship between the economy and museums seems to be insufficient [Silberger, Lord 2010: 156]. Monika Murzyn-Kupisz's deeper analysis of museums from the point of view of the economy of culture [2016] fills this gap in the Polish literature on the market.

MUSEUMS AS PARTICIPANTS IN ENTERTAINMENT

Museums, as one of the many participants in the field of entertainment, have to fight in order to attract the attention of potential visitors. The interests of contemporary visitors are focused on travelling, recreation, as well as on shopping malls, theme parks, television and the Internet, a situation sceptically assessed by the respondents. However, it seems that the presented vision of a museum as an autonomous institution is idealistic, because according to Andrea Witcomb, museums have been closely connected with popular culture, entertainment, and consumption since the 18th century [Wictomb 2003]. Respondents negatively assess the image of the institution created by the media, arguing that it raises the expectations of visitors with respect to what the visitors can expect after visiting the museum. The time spent in the museum will not be lost if there is *fun, and something happens all the time 24 hours a day* (M, the Regional Museum). According to the respondents, it is mainly huge events presenting world-class works of art or exhibitions of newly-created historical museums which attract the attention of media. These are expectations with which western museums have been dealing for several decades.

Respondents are aware of the danger of undertaking actions which were successful in the past but which, at present, may no longer meet the requirements of museum visitors. The modernization of museums helps to fight with the stereotype that a museum is like *a dinosaur which walks as slow as possible* (S, the Modern Art Museum). The respondents think that there is currently a breakthrough moment for museums, a kind of revolution which they are witnessing: *A museum has come quite a path from the form of an unchangeable Egyptian pyramid to the form of an institution which has to be lively and has to change its offer quickly* (M, the National Museum). One of the most important problems which emerges in this context is maintaining the balance *between affordability and standards"* (M, the Historical Museum). Museum employees bear in mind the balance between a high class offer (e.g. an exhibition prepared by specialists in a given domain) and the expectations of visitors, which can provoke populist actions on the part of a museum. Submission to these expectations (e.g. preparing an exhibition which is attractive to look at, but which at the same time, simplifies the presented problem) means losing the critical potential of the institution of culture. A tool which makes it possible to maintain the aforementioned balance is filling the post of a director of a museum with a person who has an appropriate professional education (history of art, history, ethnography). Respondents unanimously reject suggestions of managerization of the field of a museum. They highlight in their

answers that managers follow other priorities than museum employees. The most important issues for a manager will be to minimize costs and maximize profits, which is not seen as an effective realization of the mission of the museum: *The museum's brand is built on its program. I have not yet met such a manager with whom it would be possible to discuss the program. The museum's condition is a derivative of its program and the way in which it is implemented* (M, the Modern Art Museum). A post deemed appropriate for the manager in the organizational structure of a museum is that of a Deputy Director, whose task would be to help achieve the Director's vision.

Peter Higgins analysed the situation of British museums after introducing free access to museums in 2001. It forced these institutions to look for new sources of financing. The result of such a cultural policy was a change in the exhibition strategy, which is sometimes difficult to reconcile with curators' practices. It is worth mentioning that the process of implementing more and more activities to gain additional funds for the operation of museums (looking for financial support of corporations, granting franchises) has been present in the policy of British museums since the 1980s [Rectanus 2006: 387]. Higgins observed that "the consequence of a diminished revenue stream has been a much more aggressive approach to branding, marketing, and the consideration of the museum as a destination" [Higgins 2015: 306]. Apart from temporary exhibitions, museums offer visitors high-quality services such as, among others, "high-quality food and beverage provisions, sophisticated retail experiences, (…) and corporate out-of--hours events" [Higgins 2015: 306]. Moreover, museums opened their space for high fashion during London Fashion Week [Higgins 2015: 306]. The attempt to gain popularity among visitors by means of spectacular events and impressive architecture is not a feature characteristic only of British institutions. It seems that museums called "superstar museums" by Bruno S. Frey are in a much better market situation [Frey, Meier 2006: 410]. These are world famous museums, the collections of which include socially demanded, famous works of art, which are located in buildings designed in an attractive way and which are works of art themselves. Their location in areas of tourist interest causes them to become a "must see" for tourists visiting a given area, and at the same time brings about the development of local and regional economies. It is worth highlighting the fact that their competitors are not museums operating in their surrounding area, but other superstar museums. Maintaining the status of a superstar museum puts great pressure on these museums to ensure a more attractive and more spectacular offer than their competitors. A consequence of focusing on economic efficiency

is the tendency of superstar museums "to transform museums into providers of a *total experience*, a new role that stands in stark contrast to the traditional notion of museums as preservers of the past" [Frey, Meier 2006: 411]. According to Murzyn-Kupisz, their influence on "ordinary" museums is not unambiguous. On the one hand, these institutions are seen as innovative and transformative in the world of museums and their actions are then followed by museums acting on a smaller scale. Thanks to the massive interest which superstar museums raise among tourists, they are also ombudsmen of museums *en bloc*, creating their positive image in the world. However, on the other hand they have unrealistic expectations with respect to potential financial profits and the level of participation [Murzyn-Kupisz 2016: 67–68].

The museum employees with whom I spoke presented two contrasting attitudes towards the problem of competition among Polish museums. The first is that there should be no competition in the sphere of culture, either inside the world of museums or with outside players of the leisure and entertainment sector. Respondents claim that the offer of a museum is distinguished by its quality and high substantive level, and thus they do not have to fight for visitors, according to the maxim that a good exhibition stands up for itself. Those with a contrasting view were mostly managers of museums. They locate museums in a wider social context and they treat players in the leisure sector (and other participants of the museum sector) as potential competitors in the fight for visitors' attention. This is confirmed by the words of one of the respondents, who acknowledges that *museums are institutions which have to be a part of the market economy in the future. I understand that the guest who comes to my city for three days and will visit six museums during this time can visit me or not. If he visits me, he will leave his money here but if he does not visit me, he will leave his money elsewhere. This kind of competition is natural* (M, the Municipal Museum).

Blockbusters are tools which guarantee success in terms of attracting the most visitors, and are not only available to superstar museums. They attract thousands and sometimes even millions of visitors to museums. These visitors are not alienated by long queues for tickets or by more expensive tickets. Names of great masters of the Renaissance, geniuses of Modernism, or performances of antique and exotic civilizations fire the mass imagination. The National Museum in Warsaw established a path in Poland in 1996 by bringing in the work of art "Laying in the Tomb" by Caravaggio. The success of blockbusters is based on skilfully attracting a visitor who has not been interested in art and has not frequently visited museums until that time. Organizers offer art in an attractive and accessible form

for mass visitors, but they do not forget about the more demanding visitors for whom special catalogues, containing many scientific comments of world-class experts in a given discipline of art, are a necessity. This helps to maintain the high level of the event [Leszkowicz 2002: 16–19]. However, this way of presenting works of art is also sometimes accused of making high culture look trivial, as well as of populism and the adulation of widespread tastes [Higgins 2015: 306, Murzyn-Kupisz 2016: 69]. Of course, not all museums can afford the preparation of such a huge undertaking as is required to stage a blockbuster. However, for exhibiting institutions which have limited financial means or do not have a vast collection of significant works of art at their disposal, blockbusters can serve as an example of how to prepare a marketing strategy and use *public relations* to promote their actions, how to start co-operation with other museums, and how to gain sponsors [Leszkowicz 2002: 16–19].

A tangible measure of blockbusters' attractiveness is undoubtedly the attendance figures, which in both in the media discourse and the expectations of financing entities is the main criterion of success in the museum's operation, and the main basis of its assessment. It is a quantitative criterion, so it gives only an approximate idea of the real value of the museum operation, and it does not take into account the end results of its activity, which are difficult to grasp. The museum employees who took part in the survey distanced themselves from *the attendance fetish* (M, the Museum of Martyrdom), and they defined the success of a museum from the point of view of quality. The success of a museum should be analysed taking into account the pursuit of the mission, so the way of protecting and elaborating collections and the scientific activity should be assessed. The respondents thought of success as active participation in social change, the ability to influence the visitors' way of seeing the reality, what the participants of these events can remember. However, respondents are aware that a high attendance record encourages visitors to visit museums, so if they have such an opportunity they tout such statistics in their promotional activities. Importantly, for the respondents success also entails the ability to attract donors and sponsors. The scale of engagement of business in artistic events in Poland is not as large as in western countries [compare McGuigan 2015, Chong 2015].

The phenomenon of sponsoring can be seen in two ways – either pragmatically, as another source of financing, or critically, as a potential way of gaining a symbolic advantage by private operators in the public sphere [Chong 2015]. Both issues are present in the Polish discourse about the possibility of engaging in business in the cultural sector. As the authors of the report "Financing of cul-

ture and managing cultural institutions" [Głowacki, Hausner et al., 2009: 8–9] highlight, the opening of Polish museums to support from private sponsorship (in the form of corporate sponsorship, trusts, corporate foundations, lottery, loans and tax deductions) will increase the efficiency of their actions. Sticking to the public financing model will lead to a loss of museums' autonomy, and administrative dependence and politicization do not stimulate creative rivalry among museums as far as their program is concerned. The respondents to whom I talked are also aware that politicians often use museums to engage in political games, e.g. by financing those initiatives which serve their party's interests. In this regard, museologists first of all gave the example of museums with a historical profile, which are treated as an effective tool of creating the politics of memory, as according to Anna Ziębińska-Witek [2011: 9] "Each museum is a part of the politics of memory adopted in order to form historical awareness and the collective memory of a given community." This means that a museum can be treated as an instrument to construct and reproduce an "appropriate" scheme of interpreting the world. The way of presenting (selecting and describing) specific artefacts (and the educational materials provided with them) at exhibitions of local, regional or national remembrance, imposes on the recipient a vision of events and an assessment of past achievements and shows which and whose past is worth remembering from the point of view of the society. Museums take part in defining the 'truth' about the past which is applicable at a given time in history. Given the awareness that political and ideological influences crisscross in the museum as a symbolic place, the suggestion to extend the spectrum of ways to gain subsidies meets with opposition on the part of some of the participants in the culture field [Suchowian 2010: 279]. My interlocutors shared the opinion that the duty of the state is to subsidize museums (on the national and local levels), however with the possibility of keeping autonomy in creation of the substantive program. They supported their opinion by stressing the importance of museum collections for keeping the continuity of cultural heritage and the role which they play in the upbringing of future generations: *If we want to maintain cultural continuity and the standards of this culture, there cannot be any free market* (S, the Regional Museum). However, the respondents have different opinions about the necessity to look for additional financial support. The managers of museums claim that public funds cannot be treated as the only and satisfactory source of financing, whereas other respondents cannot see the need for going beyond public subsidies. It is possible to assume that their opinions result from their professional experience. Many respondents described problems connected with gaining capital from other sources. For example, in the case of small museums the sponsoring is limited to

barter transactions (for example, the catering during the vernissage in return for placing the logotype of the sponsor on promotional materials). Moreover, in the case of purchasing works of art, potential sponsors are interested in spectacular works which ensure their visibility: *In my view, patronage is completely ineffective in the scope of purchasing works of art (...) The sponsor will willingly give his money to something spectacular and he can advertise himself in a way which is appropriate for him* (S, the National Museum).

FINAL REMARKS

Business practices are not a universal model, the application of which will bring equal benefits to institutions of different kinds. In the case of a museum, becoming market-oriented does not have to be equivalent to gaining success and well-being. The possibilities of using market tools and the potential benefits coming from such tools have to be analysed from the point of view of specific museums. Each of them operates in a different social and cultural context. They have a different founding history, have collections with different specificities, different ways of financing, and different locations, human resources, forms of employment, etc. Moreover, some of the tasks of museums naturally comply with market requirements (e.g. running a souvenir shop or a restaurant on the museum's space), while in the case of others – such as socially-oriented functions of museums – it is hard to find a proper criteria of assessment [Janes 2007: 232]. Many observers of and participants in the museum field highlight, with some anxiety, that promoting a marketplace ideology in veiled terms – without changes in the statute but only by introducing financial and administrative mechanisms – changes the public mission of the museum [Suchan 2011: 51, Janes 2007: 222].

The results of my empirical research, undertaken as a supplement to theoretical thinking, prove that Polish museologists, despite many differences of opinion, are against resigning from the model of public financing of museums, while at the same time they support the dominance of an autonomous cultural perspective. The analysis of museologists' attitudes and declarations with respect to the changes which are going on in the museum field has revealed four basic types – a benevolent observer, a pragmatic conservative, a conservative. and a reflexive reformer. For benevolent observers, change is a natural state of affairs, hence they look calmly at what is going on in contemporary culture and adjust to the current social requirements at a given point in time. The pragmatic conservatives are museologists who do not fight change, but instrumentally make use of new tools and ways of acting in order to maintain the traditional patriarchal

model of the museum and its privileged position in the sphere of production of knowledge and high culture. The group of conservatives define the museum using the category of a temple of art. They display excessive expectations towards museum visitors – the museum does not have to be an institution for everybody, but it rather addresses its offer to those persons with relatively high resources in terms of cultural capital. The category of reflexive reformers place museums in a broader social context. They treat players in the sector of leisure time (and other participants in the museum-related field) as potential competitors in the fight to gain public attention. While retaining a strong conviction of the significance of a collection as the sense of a museum's existence, they slowly shift their attention towards the public and their needs. In the case of many of them, accepting the attitude of a reflexive reformer demanded a revaluating of their former viewpoint, since they had been educated in the spirit of a traditional museologist.

The thing which connects the representatives of all groups of museologists is the concern that resigning (in whole or in part) from the public model of financing, as well as making the amount of a donation dependent on economic indicators (such as attendance or income from selling tickets) can draw the attention of museum directors towards constructing their cultural offer in a way which will attract as many visitors as possible to the museum. According to respondents, such a way of management can result in decreasing the substantive level of the offer and marginalization of the museum's mission, which consists of, *inter alia*, the formation of a proper taste and sensitivity of recipients of culture. The museum employees to whom I talked realize that they have to adjust themselves to the requirements of the contemporary world and acknowledged that it is particularly important to taking into account new forms of participation in culture and the new demands of museum visitors with respect to the museum's offer. However, public financial support is necessary so that museums can realize their mission as a cultural heritage depositary.

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Elżbieta Nieroba

MUZEUM JAKO UCZESTNIK GRY RYNKOWEJ. KONTEKST POLITYCZNY I EKONOMICZNY FUNKCJONOWANIA MUZEUM

Streszczenie

Pod wpływem zmian społeczno-politycznych, które między innymi pociągnęły za sobą zmianę struktury publiczności muzealnej i jej oczekiwań, muzea musiały się otworzyć na nowe praktyki i narzędzia dotychczas nieobecne w horyzoncie ich zainteresowań. Procesy te przedefiniowały misję współczesnego muzeum oraz sposób komunikowania się z uczestnikami kultury – muzeum jak każda inna instytucja na rynku czasu wolnego musi zdobyć odbiorców swojej oferty, muzea wchodzą więc w ścisłe relacje z polem ekonomii i gospodarki. Ponadto model publicznego finansowania kultury uzależnia działalność muzeów od bieżącej polityki. W swoim artykule chcę podjąć problem przenikania reguł pola ekonomii i polityki w pole muzeum.

Inspiracją do podjęcia tego problemu jest materiał empiryczny zgromadzony w trakcie realizacji badań jakościowych wśród muzealników na temat postaw wobec procesu zmian, jaki zachodzi w polu muzealnym, zarówno w Polsce, jak i na świecie. Z szerokiego spektrum problemów poruszanych w badaniach na potrzeby artykułu wybrano te zagadnienia, które odnoszą się do oceny usytuowania muzeów w rzeczywistości rynkowej, źródeł wartości kulturowych i ekonomicznych generowanych przez muzea, zjawiska konkurencji między muzeami, frekwencji jako kryterium sukcesu muzeum oraz pożądanych modeli finansowania działalności muzeów.

Rozważania teoretyczne dotyczące relacji pomiędzy koniecznością wypełniania misji społecznej a oczekiwaną efektywnością ekonomiczną, a także statusu muzeum wśród innych graczy na rynku czasu wolnego i rozrywki wzbogacone zostały wybranymi wynikami badań, które potraktowano jako lokalny (polski) komentarz wobec globalnych zmian zachodzących w funkcjonowaniu muzeów.

Słowa kluczowe: muzeum, Pierre Bourdieu, badania jakościowe, efektywność ekonomiczna muzeum, superstar muzea, blockbuster

MARIA WIERUSZEWSKA*
Polish Academy of Sciences (PAN IRWiR)
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ECONOMY AND CULTURE. THE FRAMEWORK OF REFLECTION IN THE DEBATE ON THE COUNTRYSIDE

Abstract

This essay illustrates the tensions between the market economy and the democratic culture with reference to the situation wherein Polish villages faced the challenges of a new political and economic system after 1989. The author stresses the important role of assumptions derived from the theoretical basis of economics and sociology. She points to the "hidden role" that they play in the debate on the opportunities for rural communities to adapt to the requirements of modernity. The author challenges the view, quite widespread in sociology, according to which the rural community is insufficiently organized as a civic society, and that its situation is a result of a collision between the system of values governing traditional local cultural resources of agricultural villages and modern market rules. She demonstrates that democracy cannot be treated as an end in itself, but should be treated as a method of defence of civil rights and a guarantee of participation in public life. The author believes that villages [local communities] form an "indirect link" in which individuals come into contact with institutions of their society, and in which the principles of social coexistence are first developed on the basis of community ties. This leads to the conclusion that neither the territorial [local] basis nor the process of "growth" of local institutions. Linked in the long term with structures such as family, neighborhood, church, and nation, create an opposition to civic culture. History shows that successful countries have managed to reconcile the market

* Professor at the Institute of Rural and Agricultural Development; e-mail: m.wierusz@wp.pl

economy with democratic principles. On the other hand, we can observe that the more the market economy dominates, the fewer family farms. It seems that the survival of family farms, and thus also the restoration of the cultural traditions of the Polish countryside, might require overcoming the "alienness of market and culture." The market, accompanied by the adjective "social", is therefore more appropriate for the implementation of the idea of democracy and meeting the expectations of sustainable development in the Polish countryside.

Keywords: economics, sociology, culture, democracy, development, community

INTRODUCTION

The central aim of this paper is to reflect on the relationship between two spheres – culture and the economy. I examine how the relations (including tensions) between the market economy and culture resonate and manifest themselves in the discourse on the countryside. The background for this problematic field will be the general horizon of development, but also the paradigm shift in science, especially in sociology and economics. The second, shorter time horizon, included in the analysis concerns the changes in the political and economic system in Poland after 1989. The central idea of the text is based the notion that the discussion on rural development in Poland is shaped by the tension between the spheres of the economy and culture. My goal is to examine these relationships as recognized by economists and sociologists, insofar as far as I am able to do that based on their statements. As author of the text, I am taking on the role of a "guide" of sorts, who tries to unravel the tensions, collisions and disputes that surround the eponymous formulation from the perspective of my field, which ethnology and cultural anthropology. I believe that contemporary anthropology has become a kind of art of holistic description. Having developed on the foundations of the old ethnography, anthropology has abandoned a simple inventory of cultural facts and turned towards an attempt to interpret the complicated plexus of trends and counter-trends of culture. Therefore, I am playing the role of an interpreter of various statements in the scientific discourse concerning the Polish countryside that I have encountered during the many years of my professional career. Adopting such a perspective liberates me from the rigor of a methodical and systematic presentation of specific views and positions of individual authors. Instead, I examine views which have emerged from the books I've read, papers I've heard presented, and disagreements that I have witnessed. I have had the opportunity to

refer to them in my previous texts. They currently function as important anchor points for my own reflections. I count on the fact that trusting my own memory will make it easier for me to relate the characteristic rhetorical devices. It will help to evoke the style of some statements and to reproduce the atmosphere of discussion and the most characteristic lines of argument.

At this point it is worth emphasizing the specific approach to culture that characterizes anthropology as opposed to sociology. A sociologist focuses on the characteristics of individuals and investigates sets rather than systems. Anthropologists opt for a perspective allowing them to integrate related relationships. Thus, they are closer to a holistic approach to culture than to the proverbial "dismemberment of reality". Pointing out these differences already as the starting point will – I hope – help to lessen any impression of the "bizarreness" of this essay, which deviates from standard sociological text. My approach has advantages, which – in hindsight – provide a convenient instrument to describe the title issue, namely the inclusion of discrepancies and similarities between culture and the economy. I look at them through the prism of ways of describing and justifying them in the reflections on the countryside and agriculture. In other words, I am referring to the recognition by economists and sociologists of a kind of transition: from "alienness" to the gradual "taming" of culture and the economy as purviews of human activity. It is impossible to do this without a broader view of the issues associated with development and the way it is embodied in social thought. I acknowledge that the role of "guide" I have adopted in this text entails the risk of omissions, or the alleged lack of completeness. Nonetheless, I accept this challenge in the belief that the proposed form of reflection – with all the reservations – does indeed make sense.

IN THE CIRCLE OF DISTINCTIVENESS, ALIENATION, AND SYNERGY

Without going into detail, I will start with two terms: "distinctiveness" and "alienness", as they appear most frequently in the relations between culture and the economy. I would like to point out that they are not synonymous, hence I believe that their distinction is important. By its very nature, treating culture as an interrelated whole of mutually conditioned elements integrates human management (economics) into the same context of reality as that represented by tribal and peasant communities in many dimensions of their culture. In turn, adopting the historical perspective entails distinguishing between what concerns, on the one hand, the symbolic, spiritual sphere while and the other – the material,

technical, and functional sphere associated with the civilizational dimension of development. The latter perspective reveals the truth that the trajectory of culture does not coincide with the development of economy on the axis of time. They form two distinct dynamics, which – applying the principles of geometry – can be illustrated as the difference between a helix and a straight line. I remember Alina Kapciak's metaphor of a musical fugue with a recurring melody in an ever-varying scale, used to illustrate a spiral-like dynamics of cultural change. It is a good comparison, because in the long run it reflects the permanence of human fate, the immutability of existential questions and the various answers to them in a space-time continuum. In contrast to the spiral, the ascending straight line, accumulating the achievements of the homo sapiens species, mainly in the material sphere (echoes of evolutionism), was said to reflect the development of human economy. Both lines – spiral and straight – point to their distinctness, and it is impossible to compare their trajectories, as they follow different paths over time. It is noteworthy that, for this reason, when researchers wish to recognize and describe them, they may – although not necessarily have to – be regarded as "alien." I would like to point out here that the inquiries concerning the foundations of human behaviour lead, on the one hand, to the search for universal laws, and on the other imply restraint in this regard. While the theory of economics, as well as the theoretical proposals of sociology, stem from claims to adjudicate on the universal premises of human behavior, in the perspective of culture the situation is different. The aforementioned straight line as an illustration of progress stimulated by tendencies of structural and functional differentiation based on "hard" indicators – refers to evolutionism. As is well known, it was from these premises that the concept of progress and modernization emerged as a necessary and directional process of change – from earlier to later, more perfect, stages. It is worth noting that, contrary to the approach described here, it appeared in Polish sociology relatively recently, as recently as only fifteen years ago, if we assume that Piotr Sztompka's book *Socjologia. Analiza społeczeństwa* [Sociology Analysis of society] was the groundbreaking publication in that regard. [Sztompka 2002]. In fact, the critical development of the concept of "social becoming" was developed by the author in ten theses about modernization just three years ago [Sztompka 2013]. It is, in my opinion, too late for it to become a part of a broader scholarly circulation and shape the discourse about the countryside in Poland differently. The word "differently" means in a less aggressive and also less stereotypical way [Bukraba-Rylska 2008: 531]. Furthermore, it is too late to have any significant effect on the debate concerning the mutual relations between the market and culture. In the same way as sociological thought is always

burdened by evolutionary assumptions, soo too is this happening in economics. Economic development – in line with these assumptions – is seen as a gradual accumulation of technological progress, which is supposed to provide improved living conditions for people.

Anthropologists perceive the development of economy and culture in a very different way from economists and sociologists. In view of the exploration of human cultures from different parts of the world, the premises of evolution and the general theory of social development, as evidenced in sociology and economics, cannot withstand criticism. Researchers of human cultures, without questioning the cultural universals, are primarily focused on the differences in cultures; their distinctness and specificity. They are more focused on describing differences than similarities. Such an optics also determines my own [self-ethnographic] way of looking at the countryside and agriculture. Following what I have said it is possible, to some extent, to explain why interest in anthropologically understood culture is at least limited, if not wholly absent, among economists and sociologists. The "alienation" attributed to cultural and economic relations, without blurring the real differences between them, is a symptom of the marked reluctance of economists to take cultural variables into account.[1]

They admit themselves that in their circle the notion of culture is unlikely to be used, based on the assumption (illusory, in my opinion) that identical results can be achieved irrespective of cultural realities [Kochanowicz 2010: 9]. The premises for such an assessment stem from the basics of classical and neoclassical economics. The use of the concept of *homo oeconomicus* as a universal economic entity annulled the necessity to deal with culture. The adoption of this model by economists, especially from the Chicago School, gave rise to, if not promised, an opportunity to construct a general theory of human behavior. The conviction that man is always guided by the maximization of his own benefits, that is, profit, utility and satisfaction derived from greed, was meant to be consistent with the attributes of reason and rationality [Wilkin 2016: 97, 227]. Let me digress at this point: from the perspective of contemporary research, especially one that seeks reasons for bringing market and culture closer together, the old certainties of classical economics have not proved as unequivocal as the optics of "Enlightenment" as a monolith would indicate.[2]

[1] Jerzy Wilkin writes candidly that almost every economist knows that culture is important, but not everyone can explain how exactly this significance manifests itself [Wilkin 2016: 95].

[2] What eighteenth-century thinkers expressed through the language of "self-love" or "selfish interest" did not correspond with the individualistic urge to meet only one's own needs. The two approaches differed as regards issues that are usualy the subject of people's concern, such as family

FROM THE PERSPECTIVE OF SYSTEMIC TRANSFORMATION

The dispute over the meaning of both spheres – economics and culture – for economic development intensified in Poland during the post-1989 transformation. It was then that views emerged and started circulating that the countryside represented our chance, but that our agriculture was in poor condition. I would like to point out that in such a radically different assessment one could see the echo of a different treatment of socio-cultural issues as the domain of the countryside, and economic affairs as the domain of economics. At the same time the name "Ministry of Agriculture" was expanded with the phrase "and Rural Development." This could be interpreted as an attempt on the part of the ministry to go beyond the sectoral profile of agriculture and address the problems of countryside, too. It was the countryside that was supposed to be an asset in the process of systemic change. From today's perspective one can only try to guess what kinds of opportunities were foreseen at that time for the countryside. I do not feel that I am up to such task but I will say that, judging by the names of implemented projects, the commercial use of resources – including cultural ones – of the countryside dominated the activities. Returning to the aforementioned assessment: why was agriculture considered to be bad? The answer to that question is: for those reasons that referred to its major features as described and then copied in the economic literature, such as the unfavourable agrarian structure, fragmentation, which in the case of small individual farms was believed to be an obstacle hampering competition in the open international market. There was no reflection on the possibility of cooperating within that market, that is the complementarity of our agriculture, which could have been succesful, since that which had once been perceived as its weakness today is often seen as an asset. On the other hand, at that time, large state-owned farms [PGRs] proved mostly economically inefficient. As legacy of the former central planning system, they inherited its mismanagement. As a result of their transformation under the 1991 Act, half of them went bankrupt.

The absolutisation of market rules, introduced along with the systemic changes, polarized farmers. There was a growing group of farm households, as well as small households, which lived on social benefits. It was evidently adversely affecting the structure of the countryside, whose core had always been medium-size farms, and undermined the foundations of its management, rooted in the

and friends bound with shared responsibility. I have written more on this subject in a separate publication [Wieruszewska, 2012: 146].

tradition of Polish agriculture. Even the improvement of the economic situation of farmers associated with Poland's accession to the European Union and the activation of agricultural subsidies failed to turn around ther unfavourable processes in the Polish countryside and in agriculture. Krystyna Romaniszyn explains the inability to slow down the polarizing structural tendencies by citing the fact that the "protective umbrella" of the European Union came too late. It did not take place until 2004, i.e. a decade after modern, often international, agribusiness companies had managed to dominate the fields of supply, processing, and distribution in Polish agriculture. This deepened the discussed gap between the spheres of economy and culture.

Transformation began to be justified by the "intrinsic" principles of the capitalist order. Analyses of transformations of social consciousness at the beginning of the transformation era employed the phrase "pragmatization of consciousness." This term emphasized the change of people's orientation, towards shifting the accent to their material interests. It soon became clear, however, that the hasty diagnoses which announced the mass acceptance by the Poles of the pro-capitalist direction of change were not fully validated. They were dictated more by the enthusiasm of the reformers and their expectations of a quick fulfilment of their wishful thinking than a caution against the too high costs, especially for the Polish countryside and the agricultural segment. Soon, these costs were included in the price of survival of all that constitutes "the foundation of the Polish countryside" based on family-owned farms [Romaniszyn 2013: 86]. I do not recall the thought of Max Weber or Thorstein Veblen being referenced in the first stage of systemic changes, nor do I remember the views of the sociologist Jan Szczepański on the Polish countryside being taken into serious consideration. In my own experience as a researcher at the Institute of Rural and Agricultural Development of the Polish Academy of Sciences, I made the observation that that was incomprehensible to me at the time. Let me remind the reader that Jan Szczepański, co-author of the book on the renewal of the countryside, warned the reformers that they should not raise expectations above what was possible [Szczepański 1992]. In his counterargument against the bad press that peasants were receiving, he pointed out that they associated the nation with their territory. However, in my opinion, his views – the ones that were recorded and heard at institute seminars – fell on deaf ears. The same sentiment was evoked on various occasions by research into the countryside, which referred to the field experiences of my preceptor, Kazimiera Zawistowicz-Adamska, founder of the Łódź ethnographic school. Similarly, I did not see at that time any attempts to address the thoughts of Paweł Rybicki, not even his assertion that a truly strong bond is based on two pillars – community

and organization. Arguments highlighting the significance of the identity of groups capable of defending not only their values, but also their interests, fell on deaf ears. Views that presaged the end of local communities corresponded to the promoted culture of individualism, cosmopolitan values considered typical of the fluid, "hybrid" reality of the global world. The deficit of historical and anthropological perspectives in rural studies, especially in the period of systemic transformation, led to a caricature bias in judging what actually happened in the countryside and in agriculture. In short, today I see more clearly that sociology and economics of the transitional era distanced themselves from the reality of the Polish countryside. Of course, this can be justified by the argument that "the views of sociologists and the message of their works was not quite used by Polish reformers and the new political elite" [Krzemiński, Raciborski 2007: 16]. This, however, does not diminish the weakness of the scholarly discipline, which failed in the face of the "great transformation," especially in the countryside and in agriculture.

CONCERNING THE RHETORIC OF DE-AGRARIZATION

Let me here cite the notion, one that is widespread in Polish sociology, proclaiming "the end of peasants," "de-agrarization," and the collapse of the isomorphism at three levels of reality: territory as a specific familiar place, the people who inhabit it, and the local and regional culture that is specific to them, recognizable as their own. Also popular were views criticizing the farmers' attitude of "entitlement", their parochialism, lack of understanding of market rules, poor civic competence, and anachronistic mentality. Even now, a popular and influential daily writes about the "archaic social structure" of Poland, which results from the fact that the Polish have "40% of the rural population, unmatched in developed countries." According to the author of this assertion, the Poles are encumbered by a "mental and civilizational backwardness" and "archaic agrarian relations," which **must** [emphasis by the author] disappear, and "Polish modernization must be expressed in its essential part through urbanization [...] [Majcherek 2016: 9]. In the text devoted to the relationships between the countryside and the city, which I have described from the perspective of the opposition, antagonism, and tangled narratives, I have referred to this particular example as part of the broader phenomenon of the "bad press" given the countryside. I have expressed the hope that the quoted view of the journalist was not the last word dissolving the knot of tangled narratives devoted to the countryside [Wieruszewska 2016: 67].

The milieu of economists and sociologists misunderstood the issue that undermined – through the anthropological narrative – the penchant for a "jumbled"

look at the countryside and agriculture. The latter, contrary to the teachings of Władysław Grabski, ignored sociological content because it showed the phenomena of collective life inherent for the countryside, because it touched upon the imponderables that were the actually bonds of the countryside. As a result of focusing on the practical aspect, represented by experts and advisors, in sociology and economics of the transition period, the statistical computations, percentages, and presentations of numerical data failed to take into account the *longue durée*, that is, all that makes agriculture and rural reality permanent components of civilization [Wieruszewska 1991]. The period of transformation after 1989 was, in its own way, a time of profound change, therefore by its very nature it can be compared to another "ground-breaking moment" in the life of the Polish countryside. I am thinking here of 1936, when a resolution was adopted to establish the Institute of Rural Culture.

THE LIVING INSPIRATION – ACHIEVEMENTS FROM 1918–1939

The regaining of independence by the Polish state after 123 years of partition created a climate of nationwide mobilization, in which the countryside and peasant society had an indispensable role to play as the largest social group, whose mission was to defend and sustain the existence of the nation. In the era of the Second Polish Republic (1918–1939), views different from those of the sociologist-socialist and evolutionist Ludwik Krzywicki were not only heard but also appreciated in public life. This is evidenced, for example, by the fact that Władysław Grabski, an adversary of Ludwik Krzywicki and the first president of the scientific council of the aforementioned Institute, was able to create a system of sociology of the countryside and apply it in his didactic work as the first Rector of the Warsaw's School of Life Sciences (*Szkoła Główna Gospodarstwa Wiejskiego*, SGGW). It was Grabski who emphasized how special the time was, when rural youth, unlike in the past, wanted to "have their own face" and believed in the countryside and the possibilities for its development on its own terms. [Wieruszewska 2008: 31]. Despite the traumas of the war and unfavourable conditions after its end, Władysław Grabski's achievements in the field of rural sociology formed the basis of an original, independent thinking, against the pressure of those ideologists who, according to his own assessment, had no idea what the countryside and agriculture was all about. The measure of these defects was the separation of economic and socio-cultural issues in the approach to the countryside. Another scholar of peasant pedigree – Jędrzej Cierniak, curator of out-of-school education, the son of the Zaborów Land, appealed to give the countryside a chance

to be itself, which corresponded with the tone of discussion set by the father of sociology of the countryside, Władysław Grabski. Today, such intellectual inspirations should be considered as part of the current problems of identity, as being on the one hand an element of cultural differentiation, and on the other an accurate recognition of oneself among others [Wieruszewska 2008: 42]. It is difficult to understand, however, why these and similar views voiced in the era of the Second Polish Republic are so marginalized, considered as unimportant if not anachronistic, especially when pluralism is so celebrated. One such opinion was voiced by Helena Radlinska, who in her work as social pedagogue emphasized the positive meaning of the sense of distinctiveness of the countryside – not separatism, isolationism, or parochialism, but a specific distinctiveness. I am not convinced by the argument that the paradigm of "constructing the social world" [Krzemiński, Raciborski 2007: 15] developed in the field of sociology, which allegedly explains, even today, the disregard for the remnants of the pre-modern world in social studies, the remnants which – to some extent – were engrained in the reality of the Polish countryside and agriculture. Another objectionable issue is the fact that this cognitive nonchalance is combined with a banal, and not easily acceptable argument; namely that this problem does not fit within the model of "top-down modernization." Actually, the latter was only attributed to the transformation some years later [Kościański 2016]. Thus, at the beginning of the systemic challenges, views bordered on political pluralism were considered unnecessary, and rejected out of hand. Their stigmatization as a "ballast" of transformation and the proverbial "ball and chain on reform" entered into the politically correct narrative. Twenty-six years after the Round Table talks and the June 1989 election in Poland, Artur Kościański interprets this process as "a planned strategy to cut off the political and active role of citizens in the social system and in the space between family, markets and power" [Kościański 2016: 245]. This may look like an historical irony, especially given that concepts coined by sociologists to describe the rural world, such as "depeasantization" or "defamilization," along with the "dirty" – that is local, familiar social capital – in my opinion proved too far-fetched in the view of the rural realities. Current manifestations of a "quasi-return" to the features and structures that the winds of history and modern tendencies allegedly swiped away from the stage of history (to use Ludwik Krzywicki's phrase) call for a deeper reflection. Against the backdrop of the belief, widespread in the economic literature, that family farms are bound to disappear as a result of allegedly universal and irreversible rules, it is not easy for arguments advocating their protection and sustenance to be heard and acknowledged. [Wieruszewska 1992, 1996: 293, 2000: 539, 2008: 31, 2014: 139].

Therefore, a valid question arises: Do the mainstream views really have any serious arguments aside from their attachment to "universal and irreversible rules"? I do not see any, nor any reasons supporting them, be they economic, social, ecological, or cultural reasons. Voices that proclaim the inevitable disappearance of family farms are, apart from their doctrinal embeddedness in the already worn-out paradigms, devoid of merit. One can still ask whether the finale, the end – not just the end of history (Francis Fukuyama, author of that notion, later retracted it) but also other deterministic assumptions that sociological theories were wont to promote in reference to local rural communities, family agriculture, as well as the countryside as a place and territory in space – have proven to be premature? This is especially true when considering the concept of sustainable development. Today, Władysław Grabski's concept that the negative qualities of capitalism, especially morally, can be reduced, and in a sense, removed, by references to culture is worth reconsidering more than ever before. This is the first important tangential point I see in the reflection on the relationship between the two spheres: culture and the economy.

THE LINGUISTIC ASPECT OF THE DEBATE

Today, when the state of economy can be described as "turbocapitalism" and "McWorld" [Romaniszyn 2013: 61], the ostensibly oxymoronic phrase "oppressive freedom" takes on a completely new meaning. The term is perfectly fitting to describe the appeals made to farmers since 1989 urging them to embrace entrepreneurship and independent market play, to "take matters into their own hands" instead of seeking state aid. It must be added that this has been done in parallel with disguising the fact that in an agriculture ruled by the market there is no place for peasant farms. [Romaniszyn 2013: 78]. As paradoxical as it sounds, the thesis of the development of agriculture through the fall of agriculture, or the development of the countryside through the disappearance of family farms, has been encapsulated in a "newspeak" since the time of transformation. On one hand, it is the outcome of previously used antinomies such as "truth – lie," "independence of thought – subordination to official ideology," "conscience as the centre of control – discipline as extortion," "civil courage versus fear," "solidarity of equal citizens versus hierarchy," "pluralism – uniformity," to name just a few. Democratic values attributed to one element of the antinomy were contrasted with that which allegedly undermined (through the use of the devastating phrase *homo sovieticus*) the socio-cultural structure of the countryside as a community.

In the sociologists' capacity as experts and advisers, their liberal thought rejected any reflections derived from communist criticism. It was only in 2004 that a book was published that approached 'community' seriously, and made it possible to revive the contemporary political and philosophical debate. [Gawkowska 2004: 163]. One should note the distinctive character of language used to describe the social reality of transformational era. It is understandable that a living language accepts new words, while dropping others. Usually, words whose designates disappear become obsolete. I would like to note, however, that with regards to the Polish countryside, I have not found enough justification for the use of the term "rural areas," or for the very frequent appellation "entitled" in reference to the attitude of farmers, or to the processes of "depeasantization" and "defamilization". Similar linguistic manipulations have also replaced the category of "common good" in reflection on public interest. Terms such as restructuring, multifunctionality, entrepreneurship, began to mark the azimuth of the desired direction of change. Adaptation to the market economy, democratic principles, and the rule of law has set the main goals and vision for development. More detailed strategies, as the basis for decision-making, have been delegated to the local governments. Their governing principle was to be the principle of subsidiarity, implemented "from the bottom" in accordance with the grass-roots movement philosophy. It could be expected that such an approach would result in greater empowerment of the countryside and expand the activity of non-governmental organizations outside the municipality structures. That, however, has not happened. This situation aptly reflects the title of the chapter "The countryside – *sołectwo* [village council]; farmers, or unwanted social capital?" [Wieruszewska 2011: 55]. In my conclusion then I stated that the lack of cultural grounds for an agreement that is supposed to generate trust – crucial for cooperation – undermines the basis of self-organization. Thus, the question arose whether the local action groups recognized the axio-normative basis for the renewal of the common good? The so-called Local Action Groups under the Leader Program, which brought together several neighbouring municipalities and several dozen villages, have in fact failed to foster communication. Instead, they have hindered the involvement of the rural population in the immediate area of their everyday lives. This lack of sensitivity to the rural context in the Leader Program is mirrored in Polish education, as evidenced by a comparison of Polish and English geography textbooks. The vastly different approach to teaching geography in Poland and the United Kingdom has a bearing on their attitude towards the countryside and is a derivative of different theoretical and methodological models. While Polish textbooks continue to be

dominated by the concept of urbanization of space, English textbooks focus on specific problems, not figures. Students are encouraged to interpret everyday life situations. This clearly communicates the objective to teach students to identify and name problems they might encounter in their own life, rather than merely estimate the percentage of indicators. In English textbooks, space is treated not as an "area" but as a "place" with unique natural and social features. Such space is experienced by people and interpreted in various ways. The lack of such an approach, despite examples of reorientation of research, continues to occur in the economic-geographical approach to rural space in Poland. This is due to a kind of "cognitive insulation" against the cultural context, which is noticeable in the disciplines dealing with the countryside and agriculture, hence the lack of reflection on popular terms adopted together with the "newspeak." As I have mentioned, the phrase "rural areas" has become popular in Polish writings about the countryside (the Polish term *obszary wiejskie* is a calque of the original). I emphasize "areas" – and not territories or places – as spaces "tamed" by people. The wording "rural areas" has been used as a colloquial phrase, as seen in official documents, titles of books, and scientific papers. At the same time it has spread – in my opinion beyond measure – incorrectly replacing other concepts and excluding them from the field of reflection, such as the countryside, space, or territory. This would not be a complaint if there were arguments more serious than merely a convenient turn of phrase and superficial rhetoric. It is important that the term "countryside" still has its designates in reality. It is worth reminding ourselves that the direct spatial contact, typical of the village as a small settlement group, began to be appreciated again in the implementation of countryside restoration projects. This is because they reinforced the identity and communal life of rural communities. Projects which were addressed with increasing frequency to the village councils (*sołectwo*) and not – as before – exclusively to municipalities as the seat of the former administration and now local government, are a good illustration of the will to oppose the simplified theses of sociologists alleging that the countryside is "uncivic." Recognition of the specific character of the informal networks of cooperation that are strongly rooted in rural traditions undermines the claims that the countryside has withdrawn from social life. All of this restores the prerequisite to take into account the cultural context, not only as regards the model of democracy but also as the basis of various market economies. [Gumuła 2000: 117].

CULTURE – MARKET – ENTANGLED NARRATIVES

I well recall the hopes expressed by Jerzy Woś on the threshold of the transformation that the development of the market system would take into account our culture – Polish experiences and identity [Woś 2000: 570]. Support for the social market economy, which was postulated in the opening speech made in the Parliament by Tadeusz Mazowiecki, the first Prime Minister of the Third Republic of Poland, came the closest to fulfilling those hopes. Article 20 of the Constitution of the Republic of Poland also specifically mentions it. It may seem odd that the considerable support for this model at the beginning of the transformation period was interpreted as a positive reaction to the adjective "social," without however any judgment as to whether such a principle would become a reality in Poland [Swadźba 2000: 500]. This brings to mind the success of the social market economy introduced in Germany after World War II. The ideas of German ordo-liberalism have proven to be a successful combination of the role of the state and the principles of democracy and free competition – precisely by referring to culture. If we accept that culture is a cult of values, we will better understand that the recognition of values such as responsibility and freedom at the same time provided the basis for a social market economy in German society after World War II.

The "alienation of the economy and culture" visible today is further deepened by the new dimension of unfavourable phenomena. The facts that the market is alienated from culture and management from society, that the so-called money culture is fuelling wastefulness, that the market is dominated by the cult of quantity rather than quality, raise serious questions. Is culture going to surrender to the market? Will the market overwhelm culture? These questions, and the phenomena that led to them (due the lack of space I am not able to go into any detail here), are no longer so easily silenced by arguments that "the problems are going to solve themselves on their own", as was postulated at the beginning of the transformation. It was well known that success was achieved by those countries that succeeded in reconciling the principles of democracy and the free market. There was no doubt about the accuracy of the assertion that "capitalism has proven to be the most adaptable, capacious and efficient system of all that we know from history." [Wilkin 2016: 136]. It was not until much later that an undertone of contestation, or at least a deeper reflection, emerged. With it, new formulations were introduced into the discourse, which characterized the time of "great change" as "top-down modernization" and "top democratization" of the Polish society [Kościański 2016: 234, 249]. By the way, features of top-down

modernization appeared in Polish agriculture as early as the 1970s in the framework of the socialist economy [Filipkowski 2016: 162].

It would be wrong, however, to interpret the fact that, unlike in other states of the socialist bloc, in Polish agriculture individual property as the mainstay of capitalism.[3] I myself have had such expectations, even though I remembered the words of Władysław Grabski about "squaring the circle" on the path of Polish agriculture to capitalism. I would like to remind readers that such a pioneering accomplishment as the creation of the system of 'sociology of the countryside' required a thorough diagnosis of the state of research on the countryside in other countries – France, Germany, and the United States. This diagnosis revealed gaps in the research fields of foreign authors, including Russian and English, in the sense of omitting, underestimating, and even misunderstanding of issues that Grabski believed were deserving of examination in the sociology of the countryside. He pointed out the wrong directions in the research; firstly because it was based on a false hypothesis of unidirectional development, and secondly because it did not concern the countryside "as such." Many years later, Bogusław Gałęski addressed the same issue of the desertion of disciplines from the most important field of problem sociology. He drew attention to the incommensurability that exists between the knowledge of phenomena observed in rural communities and the knowledge of what such community is, what bonds constitute it and what transformations they are experiencing. I recall a conclusion inspired by my conversation with Prof. Zbigniew T. Wierzbicki[4] many years ago. We both agreed that the countryside we knew from Central and Eastern Europe and, broadly speaking, the whole Slavic area, did not exist in the West. It was possible to talk about farms, agriculture, rural environs, even rural areas while ignoring the fact that the real sociological problem in the countryside concerns the **interpersonal aspect** [emphasis by the author], meaning the things that bring people closer or farther away from one another. In order to understand what, according to Grabski, constitutes the countryside as a living space and a field for analysis, one would need to go back to the pre-World War II era. I leave aside

[3] The model farms promoted by the socialist state as exemplary „fattening farms", „extra quality class" were not so much free market niches in non-market economy, but rather a kind of symbiosis between peasant resourcefulness and the agricultural policy of the state. These are manifestations of a top-down modernization policy towards rural areas in the 1970s in Poland [Filipkowski 2016:162].

[4] I am writing these words on the day of Professor Wierzbicki's funeral in Warsaw's Powązki cemetery, paying homage to Him as a scholar and educator of young sociologists of the countryside in Poland [20 June 2017].

the sad reality that the period following the Second World War, in the era of real socialism, did not offer any opportunity to develop these ideas in Poland. It is well-known that the arguments of the opponents of Grabski won; fascinated with the modern tendencies of socialization of agriculture and mainly its industrialization, they marginalized the problem of economic autonomy of the countryside. One of the main adversaries of Grabski was Ludwik Krzywicki. He disparaged the rural-agricultural segment of Polish society as being at odds with "modern tendencies," primarily because of the ideology embedded in evolutionist thought. In addition, he did not hide his personal aversion to peasants, whom he called "thick-headed" and attached to the land. According to the trajectory of the unidirectional socio-economic development which he professed, they were bound to disappear from the horizon of the modern world. Allow me to digress here. The subject deserves special treatment and, in my personal view, it is hopefully not too late in the sense that the object of study – the countryside – might dissolve into oblivion unnoticed before our eyes.[5] Let me, therefore, remind the reader that even in the first phase of the transformation, when there were no more illusions that the collapse of communism would be followed by a rapid transition towards the new system, I pointed out the dilemmas of rural society [Wieruszewska 1996]. I argued with the widespread belief that it was an "under-organized civil society." I pointed out that democracy cannot be treated as an end in itself, but as a method of defending civil rights and guaranteeing participation in public life. I argued that the countryside as a local community is an "indirect link" in which an individual is confronted with an institution of his or her society, and where, above all, it was on the basis of community [not associations] ties that the principles of social coexistence are formed. It follows that neither the territorial basis, nor the process of "fostering" institutions related to structures such as family, neighbourhood, church or nation for extended periods of time, could be an alternative method to build a civic culture. It must not be overlooked, however, that in sociologists' optics, it was specifically for the abovementioned reasons that the rural community did fit within the democratic vision as defined at that time. The shape of civil society organized according to the "model of primitive communities," "ethos groups" and denominations, to which individuals belonged with their "body and soul," was negated. These groups, forming an "autarkic

[5] Although more than eighty years have passed since the debate between Władysław Grabski and Ludwik Krzywicki, the sociology of the countryside is still burdened by the wrong assumptions, which are duplicated as a model feature of rural communities. Among them, quite stereotypically, are listed such characteristics as isolationism (both physical and mental), traditionalism, or mythologizing the community.

social experience," allegedly hindered the formation of unions and associations based on the principle of "*aspect-based* links with others" [Wieruszewska 1996]. I pointed out that different models of democracy were forgotten, and that civil society consists of groups capable of independent existence and defence, as emphasized by Piotr Gliński. The complexity, variability, and lack of clarity of the systemic transformation in which Polish society participated after 1989 cannot be an excuse for the narrative about the countryside and agriculture dominant at that time. In my opinion, sociological analyses did not fulfil their diagnostic and critical role. On the other hand, economic analyses steered clear (by a large margin) of the complex agro-rural problem, which did not fit into the existing models and established theories. One can agree with Barbara Fedyszak-Radziejowska's assertion that "the message of everything that shapes our community and identity" had become almost completely neglected.

CONCLUSIONS

The narrative style in this essay, which readers may perhaps find somewhat unusual, if not tedious, stems from my decision to make this my own commentary. It has been meant as a description of a scholarly culture close to my environment on account of my work. The drawbacks pointed out have not been dictated so much by a polemic passion for finding gaps, negligence, omissions or intentionally concealed threads. Above all, I wish to reveal the losses suffered by villages themselves as local communities within the same adoped time structures of the *longue durée*, which resulted in the amputation of achievements of countryside researchers from the Second Republic of Poland. The saying that sometimes one can see better from a distant perspective is thus proven to be true. In striving to overcome the "alienness" that divides the spheres of culture and economy, it is worth making the effort to challenge this division. Bearing in mind that successful societies have managed to reconcile the rules of democracy with market principles, such efforts are most advisable. In my opinion, however, the pejorative tone of the interpretation and description of the countryside should be rejected in general. Such a discursive discrimination, using the slogans of populism, parochialism, and backwardness without "making an attempt to look at them closely and assessing the ideas behind them" [Deejka 2016: 512] is not a good testament for sociology. On the other hand, the "rhetorical knock-out" argument of the economy aimed at small family farms, which are accused of failing to meet the commodity criteria and are unable to compete in the global market, shifts the sociological issues of the countryside away from the field of view. The façade of the market and pseudo-

-democratic "newspeak" disguises the way in which the cultural values of the countryside as a viable potential for its revitalization are downplayed [Wieruszewska 1992: 158]. Researchers of today's farm management problems are aware of the constraints of economy insulated against the context of society and culture. Jacek Tittenbrun [Tittenbrun 2012] was one of the contemporary Polish researchers to examine the conjoining of economic mechanisms and social relations. The early attempts to reflect on the institutional basis of farm management have been noted [Wilkin 2016]. In general, the social, cultural, and therefore also moral anchor of economic processes is becoming more and more often noticed. It is no accident, therefore, that I, as an ethnographer, have taken up the subject "Culture – Economy. Space for Humanists" [Wieruszewska 2012]. The "close-to-life" approach, including economically, is now becoming a proof of the usefulness of ethnography for understanding the influence of culture on economic decisions.

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Maria Wieruszewska

GOSPODARKA – KULTURA. RAMA REFLEKSJI W DEBACIE O WSI

Streszczenie

Esej ilustruje napięcia pomiędzy gospodarką rynkową i kulturą demokratyczną w odniesieniu do sytuacji polskich wsi stojących wobec wyzwań nowego systemu politycznego i gospodarczego po roku 1989. Autorka podkreśla ważną rolę założeń, które wynikają z teoretycznego zaplecza ekonomii i socjologii. Wskazuje na „ukrytą rolę", jaką one pełnią w debacie dotyczącej szans przystosowania się wiejskich społeczności do wymagań nowoczesności. Autorka kwestionuje szeroko rozpowszechnioną w socjologii opinię o społeczności wiejskiej „niedostatecznie obywatelsko zorganizowanej" tylko jako efektu kolizji systemu wartości pomiędzy tradycyjnym lokalnym zasobem kulturowym wsi rolniczych a współczesnymi regułami rynku. Wskazuje, iż demokracja nie może być traktowana jako cel sam w sobie, ale powinna być traktowana jako metoda obrony praw obywatelskich i gwarancja uczestnictwa w życiu publicznym. Autorka uważa, że wsie [społeczności lokalne] tworzą „ogniwo pośrednie" w których jednostki stykają się z instytucjami swego społeczeństwa i w których zasady społecznego współżycia rozwijają się najpierw na podstawie więzi wspólnotowych. To prowadzi ją do konkluzji, że ani podstawa terytorialna [lokalna] ani proces „rośnięcia" lokalnych instytucji, powiązanych w długim horyzoncie czasu z takimi strukturami jak rodzina, sąsiedztwo, Kościół i naród, nie tworzą opozycji wobec kultury obywatelskiej. Historia dowodzi, że sukces osiągnęły te kraje, którym udało się pogodzić gospodarkę rynkową z zasadami demokratycznymi. Z drugiej strony obserwujemy, że im więcej gospodarki rynkowej tym mniej farm rodzinnych. Dla przetrwania rodzinnych gospodarstw rolnych, tym samym też dla odnowy kulturowej tradycji polskiej wsi słuszne wydaje się przełamanie „obcości rynku i kultury". Rynek z przymiotnikiem „społeczny" jest dlatego bardziej właściwy dla wprowadzenia w życie idei demokracji i spełnienia się oczekiwań zrównoważonego rozwoju [sustainable development] na polskiej wsi.

Słowa kluczowe: ekonomia, socjologia, kultura, demokracja, rozwój, wspólnota

PAULINA MATERA*
University of Lodz
RAFAŁ MATERA**
University of Lodz
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REVIEW ESSAY

Walter Scheidel, *The great leveler. Violence and the history of inequality from the Stone Age to the twenty-first century*, Princeton-Oxford: Princeton University Press 2017, pp. 554.

THE FOUR HORSEMEN OF THE APOCALYPSE BY WALTER SCHEIDEL

Abstract

This article constitutes a review of the book "The great leveler" written by Walter Scheidel. We refer to the issue of constructing theories and pointing out the regularities in history. We present the scientific background of the author, as well as his inspirations from other publications of a similar kind, notably "Capital in the twenty-first century" by Thomas Piketty. We analyse the elements of Scheidel's thesis that the levelling of income inequalities within the framework of states may come about only from violent shocks: mobilization warfare, transformative revolution, state failure, and lethal pandemics. We comment on each of these factors, offering a critical approach to the author's interpretation and directions for further research. We also argue that for the studies of income disparities the estimation of data about the middle class is

* Dr hab., prof. UŁ, Department of American and Media Studies, Faculty of International and Political Studies; e-mail: paulinamatera@uni.lodz.pl

** Dr hab., prof. UŁ, Department of History of Economic Thought and Economic History, Faculty of Economics and Sociology; e-mail: rafal.matera@uni.lodz.pl

crucial, as the lack of or small scope of it is the most dangerous for domestic stability. The estimations of the top 1% of the richest means less in this context. We also propose a greater focus on the impact of welfare politics in democratic states. However, we highly appreciate the author's thoroughness in compiling such a great amount of data as well as his logical argumentation, which make his work valuable, convincing, and intellectually stimulating.

Keywords: violent shocks; inequalities; economic history; Walter Scheidel; Thomas Piketty

If history only evoked facts from the past it would not be a science. Hence the main purpose of it should be explaining the studied phenomena and pointing out the regularities. For this reason it is impossible to accept the opinion of the magnificent writer Leo Tolstoy, who claimed that history had not managed to build its own concepts and generalizations, a view which, according to the great philosopher Isaiah Berlin "if true, would abolish history as such." [Berlin 1993: 35].

From time to time historians have attempted to form some general theories which could present the consistencies in different epochs and which could indicate the similar behaviours and various social phenomena in different epochs. One of the most spectacular attempts (although unsuccessful) was made in the 19th century by Karl Marx. Also a few noteworthy concepts have been formulated in the 20th and 21st centuries. They sometimes covered long periods[1] and they tried to introduce a linear vision of the past. One such wide-ranging study was presented by historian Arnold Joseph Toynbee. In his ten-volume "A study of history" he employed enormous empirical material to create a complete, linear and coherent historical concept. He also used analyses from different fields of science like philosophy and psychology and gave examples from literature or the history of religion [Toynbee 1934].

In his study, this British historian not only covered the studies of the past, but also referred to the situation of his time and formulated a few predictions. A group of followers, using a similar approach, released their works at the turn of the millennia. Among them, worth mentioning are the works of: Francis Fukuyama (*The end of history and the last man*); Samuel Huntington (*The clash of civilizations and the remaking of world order*); Benjamin Barber (*Jihad vs. McWorld*) and Daron Acemoglu and James A. Robinson (*Why nations fail? The origins of*

[1] Fernand Braudel – the guru of the French Annales School – called it "longue durée".

power, prosperity and poverty). The latest publication of Austrian Walter Scheidel can definitely be included in this list of excellent scientific bestsellers.

To disclose entirely our approach and attitudes to Scheidel's work we should declare that we both graduated in history, but later we transformed our academic careers into international relations and economics, respectively. During our study of this voluminous book we asked ourselves repeatedly: Does this concept really work? It was a great challenge to us as readers to follow all the author's arguments and a difficult task to verify his main hypothesis.

Scheidel, whose career ran through both European (Vienna, Graz, Innsbruck, Cambridge, Paris) and American (Ann Arbor, Chicago, Stanford) universities, is first of all an Ancient historian, specializing in the economic history of the oldest epochs. Among his other publications, he was a co-author of the popular *The Cambridge economic history of the Greco-Roman world* (2007) and co-editor of the oft-cited *The ancient economy* (2002). He also published excellent proven books: *Death on the Nile. Disease and the demography of Roman Egypt* (2001) and *Rome and China. Comparative perspectives on ancient world empires* (2009). His newest book, with its brave hypothesis about the main reasons behind levelling income, has been reviewed by many great publicists and specialists (including economic historians like Gregory Clark, Ian Morris, and Aaron Reeves).

The real inspirational book for Scheidel was *Capital in the twenty-first century* by Thomas Piketty, published in 2013. The French economist tried to discover general laws of capitalism. He collected big data from the 19th to the 21st centuries to show that the concentration of assets has been growing since the beginning of the industrial revolution. Following his detailed statistical observations, Piketty set out to prove the fundamental principle of capitalism. He states that the net real rate of return on capital (in fact real interest rate) exceeds the growth rate of the Gross Domestic Product. This causes an increase of the level of the inequalities of income and assets in societies. Piketty did not omit the problem associated with the levelling the incomes. For instance, he states that the two World Wars caused a decline of capital stock in relation to income. This was in part the result of the physical destruction of assets of the economies which were engaged in the global conflict, but also (even mainly) it was a consequence of the collapse of investments in financial assets and the low rate of savings. Besides, he adds that the decline of capital stock and the levelling of incomes were possible because of the changeable legal and institutional systems.[2] The critics of Piketty's theory

[2] According to Acemoglu and Robinson this generalization does not suit to Sweden and South Africa. Although Sweden was neutral but strongly connected with both parties of the conflict,

claim that he ignored institutions, politics, and the flexible nature of technology [Acemoglu, Robinson 2015: 24]. "His politics assumes that governments can do anything they propose to do. And his economics is flawed from start to finish. It is a brave book. But it is mistaken." [McCloskey 2014: 112]. We should add that Piketty not only concentrates on economic history, but also offers a vision, which includes the imposition of a steeply progressive global tax on wealth. According to some critics, this vision of continually increasing economic inequality due to the growing accumulation of capital is a dystopia [Mankiw 2014: 2].

Scheidel cites Piketty many times. Without doubt *Capital in the Twenty-First Century* pushed him to accelerate his attempts to publish his own work. Like the French economist, the work of the Austrian historian covers both economic history and refers to the contemporary situation. There are thousands of examples, from the pre-civilization era until the current 21st century economic history of the US. The key statement appears at the very beginning of the book: "(…) overall the degree of Roman income inequality was not very different from that in the United States." [Scheidel 2017: 20]. The inequalities are a fact. The growing inequalities among societies and inside societies are still being investigated. But Scheidel's goal is not only to show examples of the disparities, but also to present cases from global history when the disparities started to shrink. He uses a great metaphor to introduce his main idea, claiming that there are four main reasons – the 'four horsemen' of levelling (referring of course to the four horsemen of the apocalypse) – which decide about narrowing the gap between the rich and poor. According to Sheidel, the greatest cause of levelling incomes comes from violent shocks: mobilization warfare, transformative revolution, state failure, and lethal pandemics [Scheidel 2017: 22].

In briefly describing the particular reasons for the levelling, Scheidel claims that there are specific nuances in each case. The world wars in the first half of the 20th century were total conflicts which influenced the changes in incomes. They played the role of "great compressors" because they mobilized millions of people. What's more, the civilians were also severely affected. But not all wars have destructed inequalities. For example, domestic conflicts were not usually enough to reduce them.

Revolutions constitute another "great leveler", especially those with extraordinary violence, which usually manage to change the legal system, and in particular property laws. These revolutions were sometimes connected with wars, so they

South Africa provided army and resources. The economies of pointed states did not experience any direct destructions of the capital stock [Acemoglu, Robinson 2015: 19].

enhanced the effects of each other as far as the levelling of inequalities is concerned. Another event which diminishes the disparities in incomes in a society is the failure of a state, which is most often the result of wars and revolutions. The common feature of these 'horsemen' is the fact they rely on violence to move the wealth from one group to another. The last 'horseman' is a pandemic. Scheidel considers only those which caused large numbers of deaths, changing the social relations. The historian indicated that all the "great levelers" could act separately or in twos, threes, or altogether.

Of course, these four horsemen were not the only events which reduced dispersions of income between the rich and poor, but other factors mentioned have a mixed record in history and usually brought about only limited changes in income disparities. Among them Scheidel distinguishes macroeconomic crises, but they usually have had only short-time effects on income disparities. It's worth noting that he also considers democracy as a phenomenon which, based on its typical economic and political features, can either reduce or increase the disparities. He admits that "[a]lthough the interplay of education and technological change undoubtedly influences dispersion of incomes, returns on education and skills have historically proven highly sensitive to violent shocks. Finally, there is no compelling empirical evidence to support the view that modern economic development, as such, narrows inequalities. There is no repertoire of benign means of compression that has ever achieved results that are even remotely comparable to those produced by the Four Horsemen." [Scheidel 2017: 25]. In that sense he agrees with Piketty, who doesn't believe that a free market can create favourable conditions for flattening the income disparities. Both agree that the liberal world lost the fight against poverty. Scheidel quoted president Barack Obama, who pointed out that problem is not that the incomes of Americans are so widely unequal, but rather that there are too many poor people [Scheidel 2017: 34].

In the well-reasoned introductory part of his book Scheidel acknowledges that economic disparities are not the one and only type of inequality in societies. But since he could not include all the aspects, he decided to concentrate on the distribution of material resources within societies, excluding the problem of inequalities between countries. He also presents the tools for the measurement of disparities. He uses the most basic metrics: the Gini coefficient and percentage shares of total income, also referring to ratios between shares or particular percentiles of the income distribution [Scheidel 2017: 27–28]. He points out some methodical constraints, especially with respect to data before the 19th century. The income inequalities in antiquity and the Middle-ages, and even in the first three centuries of modern times, must be estimated with a high level of approximation, based on

limited data and even on archaeological findings. However, Scheidel managed to collect an impressive amount of knowledge and data about tax records, which enabled him to reconstruct the real wages, the wage ratios, and the GDP levels. Especially after the release of Angus Maddison's rich calculations[3],economic historians have had a lot of material for analysing inequalities. In the end of the introductory part Scheidel reveals why he wrote the book. He wanted "(…) to show that the forces that used to shape inequality have not in fact changed beyond recognition." [Scheidel 2017: 37].

Great disequalisation began after last Ice Age and "(…) over time has been the result of a combination of three factors: the relative importance of different classes of assets, how suitable they are for passing on to others, and actual rates of transmission" [Scheidel 2017: 54]. The historian has doubts about the significance of particular factors, but admitted that "(…) to the extent that state formation introduced steep and stable hierarchies into societies with significant surpluses, inequalities of power, status, and material wealth were bound to grow. Even so, a growing consensus now holds that organized violence was central to this process." [Scheidel 2017: 59].

Scheidel often uses popular but advanced economic terms and illustrations. On several occasions he used the Lorenz curve, which can show us the disparities in income and wealth. His interpretation of this tool is very convincing. He states that: "Most of the Lorenz curves we could plot on the basis of these guesstimates would resemble hockey sticks rather than crescents, pointing to sharp disparities between a select few and a large majority at or not far from basic subsistence. With a few exceptions, such as the ancient Greeks[4] and the settlers of colonial North America." [Scheidel 2017: 74–75].

Scheidel's *opus magnum* consists of seven parts, including four main chapters which cover the four horsemen: war; revolution, collapse, plagues. The last two parts include alternatives – an analysis whether other factors could have an impact on inequalities and the future of levelling. The author also constructs counterfactuals – he tries to answer the question what would have happened if the "four

[3] Scheidel cited the "Maddison project" several times: http://www.ggdc.net/maddison/maddison-project/home.htm http://www.ggdc.net/maddison/maddison-project/home.htm[accessed on 25.07.2017]. It should be added that Maddison's excellent works [Maddison 2000, Maddison 2001, Maddison 2007] were also rather useful for measuring inequalities between the states.

[4] However, according to Bitros and Kyriazis the Gini coefficient for Athens in 4 BC was higher than for the Roman Empire in 1 AD. The Lorenz curve for Athens is presented in: Bitros, Kyriazis 2017: 134. Scheidel and Friesen estimated a higher Gini coefficient for Roman empire: Scheidel, Friesen 2009.

horsemen" had not appeared. This is not typical dystopia, but rather alternative history. However we do not want to describe particular parts of the book here, but rather focus on the argumentation of the author in a few selected problem areas.

We wonder what would be Scheidel's opinion on the observation by the famous Polish sociologist Zygmunt Bauman's of a decreasing trend in inequality between nations with a simultaneous increase of it within one country, which is often measured using the Gini coefficient [Bauman 2012: 36]. However, neither the first part of the thesis nor the second finds its proper justification in most economic research. One may here seriously debate the calculation methodology.[5] Bauman's thesis is refuted by neoliberal economist Deepak Lal, who tried to break the stereotype of increasing disparities between rich and poor countries. He proved that at least since the 1980s world poverty has decreased [Lal 2006: 135]. According to Lal, the diminishing of poverty in the developing world began as a result of Chinese reforms at the end of the 1970s, the liberalization of the Indian economy in 1991, and as a consequence of the transformation of planned economies into market economies in Latin America. The only region where poverty has actually increased in recent decades is Africa, which has been struggling with serious governance problems and has failed to fully integrate with the world economy.[6]

Scheidel should consider Lal's well proven outcomes when claiming that the thesis of the increase of inequality within particular countries cannot be defended effectively. Lal's thesis is also in contradiction to Sheidel's statement that development does not significantly influence the level of disparities on a global scale. Even if in the 1990s such countries as the USA, China, Great Britain, Nigeria, and in particular Russia and the countries of Eastern Europe noted an increase in the indices of national inequalities, at the same time Sweden, Brazil and Mexico noted decreases in the indices, and in the four great economies of Asia – India, Indonesia, South Korea and Vietnam – there was no tendency towards an increasing inequality. The more balanced and scientifically proven conclusion is thus Lal's: while some countries developed in the next stage of globalisation, other states experienced a greater or lesser regression [Lal 2006: 137–139]. From Scheidel's book we can derive the conclusion that in fact societies produce inequalities automatically. While they can be enhanced by external

[5] It depends on which countries are compared, the same in two different periods or a given number of the richest and poorest states in the same periods.

[6] Lal explains where the misconceptions about the increase of the world income differences come from. He claims that they stem from a lack of reliability in the research at the lower level and an incorrect use of statistics applied by the World Bank. See more: Matera, Matera: 2011.

factors, especially in the era of globalisation, nevertheless the great disparities did not appear in the United States after the war – we can spot them no sooner than in the 1970s. This was the time when the American predominance in the world economy was weakened for many reasons. But we could still observe a peaceful path to levelling the inequalities, which we presume would be the position of hegemon – the initiator and guardian of the international system. This of course is not available for all countries, but still it is not the result of violent change. One can argue it was a result of the WWII. In any case the impact of the hegemonic position itself deserves further research.

Scheidel also admits that there are the cases of noteworthy decreases in income disparities in Latin American countries at the beginning of the 21st century. He presents these as exceptions to the rule, which are quite recent and may be short-lived. But in fact we cannot predict the development of the situations in many regions, e.g. the impact of the economic initiatives of China for South-East Asian countries, or for Africa. We also find it quite surprising that Scheidel categorises the welfare state reforms in Europe (at the beginning only in the Western part of it) as the outcome of WWII. We totally agree that this change occurred because of the growing popularity of communist parties after the global conflict, the outbreak of the Cold War, and the necessity of creating alternative development paths for those societies which were seriously damaged by the war. But the rivalry between the free world and the communist bloc was over in 1989, and since then we have witnessed the emergence of brand new initiatives in this field which are introduced in a peaceful environment, including within the framework of the European Union. Even in the United States sound initiatives for change have been launched, e.g. the so-called 'Obamacare' Act aimed at providing universal health insurance. Although it is currently contested by the Donald Trump administration and the Republican majority in Congress, it will be difficult to overthrow it completely. These examples, and we can evoke many others, show that Scheidel's assertion that democracy does not have an impact on reducing inequalities is not accurate. We can surmise that this is because his focus on the richest 1%. As a result, the role of the middle class, and in particular its size and significance in particular countries, is neglected, which in our opinion makes the whole picture of inequalities and their consequences for societies rather blurred. This seems quite surprising, as the author underscores the role of the political factor in the inception of inequalities (including in prehistoric times, which is absolutely fascinating), but underestimates it in the period after WWII. It is also worth emphasising that welfare programs serve the society best in democratic

systems. In authoritarian or totalitarian systems, they are usually used as tools to achieve public support and weaken the opposition. This petrifies oppressive rules.

It's hard to deny that global conflicts involving mass mobilization diminish inequalities. On the other hand, when we investigate the particular cases of their outcomes, we can observe specific results. If we consider the situation of the United States during and just after WWII, we can observe many factors which could add to the growing inequalities in the victorious country, whose territory was not directly affected by the warfare. Scheidel explains that the administration of Franklin Delano Roosevelt intervened in the economy to the greatest extent. He imposed huge taxes on the wealthiest, froze prices, practiced takeovers of companies, etc. Yet the state control was not complete. The great companies took advantage of the war demand and made enormous profits, e.g. Lockheed [Hartung 2012] – they even traded with Nazi Germany [Talbot, Horn 2014]. We can postulate that this could add to inequalities.

The impact of revolutions on levelling is also quite obvious, especially when they are communist in character, as in Russia, China, North Korea or Cambodia. Besides the decrees of new authorities which deprived the owners of their property (land, factories, etc.), their violent character also led to physical elimination of the richest, at least those who had not managed escape abroad. The factor of the brutality of the changes is very important for Scheidel. In this context it would be interesting to compare the income levelling in the Soviet Union and in the Eastern European countries which were under Soviet control after WWII. The character of the changes in the system were of course not peaceful in the Eastern European countries, but the extent of brutality was certainly lower than in the USSR or China. Yet the level of inequalities was quite low. For example, the Gini index for Poland in the 1980s was between 0.24 and 0.26 [Brzeziński, Jancewicz, Letki 2013: 12], which was very similar to that of the USSR [Scheidel, p. 247]. It would be very interesting to trace the reasons for these outcomes.

The power of levelling brought about by the collapse of a state is illustrated by examples mainly from ancient times, but the more contemporary case of Somalia is also analysed. This was an example of a so-called 'vampire state', where the ruling elites gathered enormous wealth and neglected the rest of the society. It is thus no wonder that the collapse of the authorities and the end of discrimination against the rural communities contributed to the diminishing of inequalities. Scheidel admits that contemporary cases of the total collapse of a state are very rare, and rather temporary in nature. We suggest it would be interesting to study instances of so-called "dysfunctional states", where the authorities are not able

to control the their territories and to bring to life the rules of law they established [Ottaway 2006: 189–190].

The impact of deadly epidemics on the levelling of inequalities is very well documented and should not evoke any doubts. Fortunately, the examples come from the past. As Scheidel notes, although lethal diseases also appear from time to time today, the reaction of international organizations which deal with such issues, as well as those of particularly well-developed states, is very rapid, which enables us to suppress most pandemics in the bud. Even if the people have not found the cures for some of them, their dispersion can still be limited.

Finally, we can ponder the existence of a "Fifth Horseman of the Apocalypse", namely natural disasters. Scheidel mentions them, but rather as a factor enhancing the main leveller (for example, when he describes the collapse of the Hittite empire around 1200 BC he refers to earthquakes and droughts). We can suppose that they were probably more important in the remote past. Nowadays, in highly developed societies the results of natural catastrophes can usually be ameliorated quite quickly, or even prevented. The situation is quite different in the poor countries, which in this regard could be compared to the less advanced states in ancient history. In many cases natural catastrophes can claim millions of victims. By 'victims' we mean not only those who lost their lives, but also those people who were hit in other ways by the catastrophe (e.g. physical injuries or loss of their properties). We can evoke the examples of the great floods in China in 1839, when between one and four million people perished, or in 1887, with a similar number of victims.

We could also examine cases from the recent past, namely the effects of the tsunami of 2004 which hit mainly Indonesia, Sri Lanka, India, and Thailand, as well as the earthquake which occurred in Haiti in 2010.

As far as the tsunami is concerned, we do not have complete data concerning the Gini Index from Indonesia and India to compare the situation just before and after the disaster. However, we can observe the changes in Sri Lanka – where the Gini coefficient was 40.96 in 2002 and dropped to 40.25 in 2006, and to 36.39 in 2009. In Thailand the changes were also significant: from 43.54 in 2004 to 39.76 in 2007 and 37.46 in 2011 [data.worldbank.org]. We can also state that the tsunami definitely had a mass effect: the death rate was 200,000 in Indonesia, 38,000 in Sri Lanka, 16,000 in India, and 11,000 in Thailand. In these four countries the number of injured was also significant – 100,000; 17,000; 6,000; and 8,000, respectively. We should also consider the material impact, which added to catastrophic outcomes of the tsunami. The economic losses estimated just after

tsunami were: for Indonesia – 4.451 bln USD; for Thailand 2.198 bln USD; for India – 1.124 bln USD; and for Sri Lanka – 1.454 bln USD [Rego 2006].

In case of Haiti, three million people were badly affected by the earthquake, among them as many as 300,000 may have lost their lives. The total economic loses were as high as 7.8 bln USD (while the Haiti GDP was 11.9 bln USD in 2009) [University of North Carolina 2013]. However, we cannot observe the diminishment of inequalities as measured by Gini index, mainly because of the gap in the data gathered by the World Bank. We know that in 2001 the Gini index for Haiti was 59.48, while the next calculation, which places it at the level of 60.79, comes from 2012 [data.worldbank.org]. Besides, as Haiti is one of the least developed countries in the world, we can assume that the disaster impacted mainly poor people (about 80% of its population lived below the poverty line), and that this country is also one of the most inequitable ones in the world [Barton-Dock 2014]. Maybe the above-mentioned events cannot be compared with the Black Death plague from the 14th century with respect to their impact on reducing inequalities of income, but still they should be taken into consideration in future research on this topic.

To conclude our review of Scheidel's *opus magnum*, we should underscore that in the era of the 'global village' there is a growing level of envy not only between individuals and societies, but also between countries. The potentially deepening disparity between rich and poor states would not have such social consequences if the people living in impoverished states did not have the opportunity to 'see what it's like' to live in the 'better world'. Citizens of developing countries can follow the life of the rich on their TV screens or smartphones, not to mention often having friends or relatives abroad with whom they are in contact. This not only frustrates them but also evokes resentment, which may lead to the reinforcement of extreme behaviours on the part of the citizens of poorer countries [Dzionek-Kozłowska, Matera 2015: 32]. For this reason the disparities between countries in the globalized world may be worth analysing even more than the disparities within one country (provided they are not too striking). Concentrating only on top 1% of the wealthiest is not good enough. In our opinion the standard of living of the richest is not so much important as it is perhaps annoying for the rest of the society. Income inequalities are most dangerous for domestic stability in the absence of a robust middle class. The top 1% means less in this context. And in our opinion the ways of building a more sustainable society (as far as the distribution of income is concerned) can be achieved by peaceful means. It is also

worth noting that the effects of levelling brought about by the "four horsemen" are not durable, especially when we calculate the human costs of the changes.

Scheidel presents a pessimistic view: according to him people are not able to overcome excessive inequalities without using violence or experiencing an unfortunate occurrence like a plague, i.e. some form of *force majeure*. According to the Austrian historian this thesis is strengthened by the interdependence of political power and economic success, which can be traced from the past (the excellent example of Chinese Empire) up to contemporary times. Scheidel's vision provokes the question whether it is possible to create an equal society and whether we really want to do so. Scheidel also cannot answer what is the optimal level of inequality which should or can be pursued. It is obvious that a "zero Gini index" is unrealistic and unthinkable. Basically, the aim of those governments which care about the well-being of their citizens is to offer assistance for the poorest, excluded, disabled, and socially maladjusted. To implement this, the money must come from the taxes paid by the middle class as well as the richest stratum. Besides, as Scheidel has shown, the costs of achieving a significant diminishing of disparities are enormous. At the end of his book he states that: "History does not determine the future. Maybe modernity really is different." [Scheidel 2017: 478]. But we can sense he is rather sceptical about this, as he adds: "(…) peaceful policy reform may well prove unequal to the growing challenges ahead. But what of the alternatives? Be careful what you wish for." [Scheidel 2017: 478].

The value of this book also lies in its analysis of the particular factors which produce or reduce inequalities in different regions of the world. Thanks to that we can see that the level of the inequalities depends on many factors: culture, the political system, the economic policy of the governments (particularly the degree of their intervention in the free market), the quality of the civil society, geopolitical circumstances, etc. There are many inspiring findings, e.g. the positive impact of the great military conflicts on the level of democracy, especially franchises and the strengthening of trade unions. We have to express our admiration for the enormous amount of collected data, as well as the logical creativity in their interpretation when they are incomplete (as well as Scheidel's brilliant conclusions derived from archaeological findings). In this context we have to also appreciate his scientific fairness – every time Scheidel cannot prove his hypothesis, or the outcomes of his research are at odds with his original assumption, he consistently admits it. His great book is a source of outstanding knowledge, well proven, with original conclusions, and provides inspiration for discussion. To sum up, we have to state that Scheidel's theses are convincing, with the few reservations we have pointed out. But they tend to postulate a dilution in the scope of research in this field.

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Paulina Matera
Rafał Matera

CZTEREJ JEŹDŹCY APOKALIPSY WEDŁUG WALTERA SCHEIDELA

Streszczenie

Esej zawiera recenzję książki Walter Scheidela "The great leveler". Odnosimy się w nim to przedstawionej przez Autora teorii oraz dostrzegania przez niego prawidłowości w procesie historycznym. Przedstawiamy syntetycznie biografię naukową Scheidela oraz identyfikujemy Jego inspirację publikacjami, w których podejmowano podobne wątki, szczególnie pracą Thomasa Piketty'ego "Kapitał w XXI wieku". Odnosimy się do poszczególnych elementów tezy Scheidela, który twierdzi, że wyrównywanie nierówności dochodów w ramach państwa może mieć miejsce jedynie w wyniku silnych wstrząsów, takich jak działania wojenne, rewolucje, upadek państw czy epidemie śmiertelnych chorób. Przedstawiamy krytyczną analizę twierdzeń Autora oraz proponujemy kierunki dalszych badań poszczególnych czynników. Przybliżamy również tezę, że dla badań nad nierównościami dochodów kluczowe są dane dotyczące klasy średniej, gdyż jej brak lub niewielki udział najbardziej zagrażają stabilności wewnętrznej państw. Skupienie się jedynie na 1% najzamożniejszych obywateli ma w tym kontekście mniejsze znaczenie. Proponujemy również wzięcie w większym stopniu pod uwagę polityk społecznych – państwa opiekuńczego – realizowanych w wielu państwach demokratycznych. Mimo tych krytycznych uwag, bardzo pozytywnie oceniamy skrupulatność naukową Autora, który oparł swoje badania na ogromnej liczbie danych. Na najwyższe uznanie zasługuje również logiczna argumentacja. To wszystko czyni Jego wywód przekonującym i inspirującym intelektualnie.

Słowa kluczowe: gwałtowne wstrząsy, nierówności, historia gospodarcza, Walter Scheidel, Thomas Piketty

BOOK REVIEW

BARBARA MARKOWSKA*
Collegium Civitas, Warsaw
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Jacek Tittenbrun, ***Neither capital nor class. A critical analysis of Pierre Bourdieu's theoretical framework***, Wilmington: Vernon Press 2017, pp. 365.

EITHER CAPITAL OR CLASS…

Jacek Tittenbrun has been writing about the concepts of capital, social differentiation and class consistently for several years [2011; 2013; 2014; 2015]. The reviewed book from 2017, referring to Pierre Bourdieu's theoretical framework, thus appears as a logical continuation of his intellectual endeavours. The main justification of his critique is based on a conviction that in the case of Bourdieu's multiplication of capitals and his approach to social class, the original Marxist concept was unnecessarily proliferated and contaminated. If one considers the relationship between Marx and Bourdieu, it must be admitted that it's not clear and many aspects could be a matter of concern. According to a popular narrative, Bourdieu extends Marx's thought using his particular extra-economic notion of capital [Swartz 1997; Fowler 2011; Desan 2013]. However, it seems relevant to ask whether such a theoretical move is well justified and what it means.

Tittenbrun's above-mentioned work is quite long (over 300 pages) with many sub-arguments: ranging from Bourdieu's theoretical insights and its empirical applications to an analysis of his place in the intellectual tradition and public engagement; and from discussions about ownership and capital using 19th century concepts from Frank Fetter and Eugen von Böhm-Bawerk (co-founders of the Austrian school of economics) to a detailed analysis of the EU budget and fiscal

* Dr, Institute of Sociology; e-mail: barbara.markowska@civitas.edu.pl

policy. In his argumentation, Tittenbrun uses many types of sources: in some fragments he focuses on selected works of the French sociologist, and in other places a great volume of secondary literature is dominant (always well-criticised, but not always relevant from the perspective of Bourdieu's legacy).

The book consists of five chapters with different questions and levels of conceptualization. The most important one is the first chapter, which discerns the crucial ideas in Bourdieu's framework such as: class, habitus, social/cultural capital, the mechanism of distinction, and symbolic power. The second chapter is a short digression mapping out structuralism as an essential background for Bourdieu, underlining his dependence on Levi-Strauss's linguistic formalism. The next part of the book is devoted to economic issues like the concepts of rent and ownership, as well as the role of the state and tax policy in EU countries. Here Tittenbrun begins his argument with the suggestion that Bourdieu represents economic imperialism and, like representatives of the first Vienna school, does not properly understand the Marxist concept of capital. This is followed by a chapter dealing with the problem of class and capital in the context of reproduction of social inequality. Here, the author focuses on Bourdieu's assumption that educational attainment is profitable, depending on the level of embodied form of cultural capital. The last part of the book refers to the public engagement of the French sociologist, explaining his activities by the political transformation of leftist intellectuals. Thus, we can read about social solidarity as a core element of the European political project. The conclusion summarizes the principal argument of the whole book and includes reflections on why Bourdieu is so popular despite the fact his analytical tools are fallacious and "utterly redundant" [p. 316].

The style of Tittenbrun's presentation is very characteristic: instead of a reconstruction of the main ideas we find an unconventional understanding of the problem of capital, classes, and symbolic domination, laced with polemic and emotional points of view. From the very first page the reader becomes acquainted with his main allegations against the author of *Distinction*, such as lack of originality (everything had already been discussed by Marx, Weber, and Parsons), formalism (the field of social relations is a formal structure), physicalism (Bourdieu's belief in social laws), reductionism (everything leads to symbolic power), determinism (habitus determines our free choice and is our destiny), and methodological fallacy (confusing outcomes for causes, and class for estate). But most striking is the accusation levelled against the French neo-Marxist about "an extreme form of reductionism and essentialism" identified by Tittenbrun as a claim that "social life is driven by the single logic of capital, or perhaps Capital" [p. 8].

Moreover, for Tittenbrun Bourdieu – influenced by Althusser – is not able to think in a dialectical way: his position is dogmatic (idealistic from one point of view and materialistic from the other) and naturalistic, filled with economic imperialism in a "good" neo-liberal style. But the greatest sin of Bourdieu and his followers is the anthropological usage of the notions of culture and economy, giving them a broad, formal (i.e. not substantive) meaning. This manner of thinking is, according to Tittenbrun, absolutely unnecessary from a sociological perspective. Thus, the notion of cultural capital and the mechanism of distinction are for him meaningless and redundant concepts; they have no explanatory force but are only ornamental obscure the relation of economic exploitation as a source of social stratification. His basic assumption that there is only one capital – economic capital, as defined by Marx – leads him to a strong conclusion: non-economic factors like education, language competence, and taste make no difference.

The main problem with this interpretation is that the collection of arguments presented in the book seem to be the result of an idiosyncratic reading and misunderstanding of Bourdieu's entire theoretical position by Tittenbrun. Furthermore, his book has a chaotic patchwork-like construction. Except for the first chapter, the rest of the text has little direct connection with Bourdieu and his framework. This is true for several reasons. Firstly, Tittenbrun's critique is based on a specific substantive relationship between scientific language and reality, working with quotes as if they were autonomous parts of a text and looking for their literal meaning. Secondly, the reasoning is built as a mosaic of both short and very long decontextualized quotes from secondary literature, which persuasively reveal the author's point of view, but hide his own original line of argumentation.

The most concise argument is that forms of capital are hard to distinguish from each other. Moreover, Tittenbrun suggests that cultural and human capital (related to knowledge and linguistic competences) are the same, and social capital does not exist at all. While a detailed discussion of these remarks is beyond the scope of this review, it is clear that human capital is a part of cultural capital. In addition, cultural capital is, from Bourdieu's perspective, not just human and belongs not only to individuals. Following the cultural turn in social science that made the role of culture an independent variable is crucial. Since the notion of cultural capital is extremely liquid in Bourdieu's thought, one can summarize that as a theoretician he preferred a work in progress, looking for the best application of theoretical tools in understanding social reality, governed by the principle of distinction.

Obviously, Bourdieu as an object of critique is not an accidental choice. His mode of thinking and legendary obscure style of writing made him an easy target

[Alexander 1995]. Tittenbrun provokes sustained critical reflection on this influential thinker and is right that the theoretical contribution of the French sociologist remains a network of metaphorical notions and concepts with variable meanings. But we can posit that his influence on social sciences appears quite powerful for one reason: the 'spirit' of synthesis that allows one to overcome oppositions in methodological (micro-macro) and epistemological (objective-subjective) perspectives, and combining ethnological and historical insights with a claim to a general theory of practice. Bourdieu's attempt to make sociology a strong, empirical science, without scientific blindness, has been recognized by many followers and is used in empirical research [Lamont 1999; Bennet et al. 2009].

To conclude, paraphrasing a claim by John Golthorpe (another famous critique of Pierre Bourdieu), we can say that the main aim of Tittenbrun's book is to prove that everything that is sound in Bourdieu's theory is not original, and what is original is not sound [Golthorpe 2007]. This audacious attempt is characterized by a hidden purpose: to diminish the scientific importance of Pierre Bourdieu's output in order to empower his own theoretical position i.e. socio-economic structuralism immersed very deeply in the Marxist-Leninist tradition. The author of *Neither Capital, Nor Class* has developed a critical approach with one doubtful result: so that readers will have little motivation for reading and working on Bourdieusian concepts. Perhaps the author of *Pascalian Meditations* was right: "one kind of critique is only an irreproachable form of murder" [Bourdieu 2000: 61].

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