

HISTORY AND STATE OF THE ART OF SOCIOLOGICAL RESEARCH

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Empirical Research on Social Stratification in the Visegrád Countries: An Overview

Abstract: This article outlines developments in empirical research on social stratification in the four countries constituting currently the Visegrád Group (V4). Sociology has been developing, if unevenly, as a discipline in these countries since the 19th or early 20th century. Empirical research on social stratification, based on data collected in large surveys, started here by the mid-1960s, first in Poland, then in Hungary, and later in the former Czechoslovakia. In spite of the ideological pressure of the communist regimes in all of these countries, the conditions for sociological studies were much better in Poland and Hungary than in Czechoslovakia, where such research was frozen for a long time after the communist putsch of 1948 and again after the Soviet occupation in 1968. After 1990, this kind of research enjoyed an energetic new start in all the post-communist countries, as they opened fully to the West and integrated into international networks. In addition, comparative research within the V4 region started with the challenging project “Social Stratification in Eastern Europe after 1989.” Many national surveys were conducted and East-West cooperation intensified. Currently, most empirical research on social stratification occurs on a national or bilateral basis, or is developed within larger European projects.

Keywords: empirical research, social stratification, Visegrád countries, comparative surveys

Introduction

This article focuses on research into social stratification and social mobility in four countries constituting currently the Visegrád Group: Czechia, Hungary, Poland, and Slovakia. Our motivation was pragmatic—to outline the historical background of existing empirical research on this topic for the sake of a comparative project on social stratification in Central Europe.¹ Moreover, by coincidence, in 2023, sixty years will have passed since two important events in this field occurred: Stanisław Ossowski’s influential book on various approaches to studying the social structure was published in England and evidenced the readiness of Polish sociology to contribute to international research, and in the same year, the first representative survey on social stratification and mobility among communist countries was conducted in Hungary. Sociological research was not allowed in

¹ As the mentioned project included also Austria, the term Central Europe was used (being aware of a variety of its definitions). This article reports only about countries currently grouped in the Visegrád Four. For simplicity, we use the abbreviation V4 thus disregarding the fact that it is ahistorical up to 1991 when this Group was established (involving three countries) or even up to 1993 when it—after dissolution of Czechoslovakia—developed into the Visegrád Four.

Czechoslovakia at that time. A later advocate of such research, Pavel Machonin, only tested the terrain in writing about “Socialist Work Brigades.”²

Research on socio-economic inequalities and class/status structures is one of the basic approaches to understanding modern societies. Since the 1930s, empirical research has been conducted on the ascribed and acquired characteristics of individuals and their intra- and inter-generational mobility. The deep economic and social transformations produced by industrialization were followed by changes in education and employment structures. The establishment, rise, and decline of the working class have been increasingly reflected in the social structures of modern societies. Both the availability of surveys and advanced statistical tools have facilitated sociological empirics.

Empirical research on social stratification received great impetus in 1950, when the first World Congress of Sociology, convoked by the International Sociological Association, was held in Zurich. There, the Research Committee on Social Stratification and Mobility (hereafter the RC28) was established. The very next year it organized a conference in Paris, where David Glass pointed to the need to conduct large population surveys, and not solely among the communities and social groups that had so far been studied (Rogoff-Ramsøy 1983). While the Congress was still attended by three Polish sociologists, by 1951 no scholar from a country behind the Iron Curtain could join such a “subversive initiative.”

In the communist East-Central Europe of the 1950s, social structure and mobility were dismissed as research topics and replaced with Marxist-Leninist ideology. Stalin’s doctrine of “sharpening of the class war in the first phases of the building of socialism” was imposed in countries where the communist parties took power after Second World War under Soviet rule. Once the bourgeoisie was removed, the social structure was officially simplified into a ternary scheme of “two allied classes”—the working class and the peasantry—and what was called “the rest,” a social group/category/stratum of the “working intelligentsia” and “other employees.” Much of the later sociological effort was invested in challenging this simple scheme and providing a more realistic picture.

In spite of equalization efforts, communist societies remained intricately differentiated. The social inequality of the enormous majority of the population was based on occupation, education, income, and lifestyle. Only a very small minority acquired advantages based either on power and privileges (the communist elite, or so-called New Class) or on shadow incomes and hidden wealth (from occupations that administered and provided rare goods and services in the communist shortage economy). While it later became possible to describe the visible part of the social inequality in empirical surveys, the resources and position of this concealed part of the population resisted any direct reporting.

Research paths in individual countries diverged. In former Czechoslovakia, the class-war vocabulary was replaced by an ideology of social homogeneity, or of an “all-people’s society” as this was considered more befitting the period of the alleged “victory of socialism,” which was officially announced in the 1960 Constitution and legitimized by indoctrinated social sciences. The thaw period, which began in the mid-1960s, was beneficial for research. More nuanced differences among people could be admitted. After

² See Machonin 1963. Under the motto “work and live the socialist way” and by pressure from above, Socialist Work Brigades were massively established for the purpose of showing their members’ enthusiasm for work and their willingness to share their leisure time, thus declaring their collectivist spirit throughout life.

the Soviet occupation in 1968, the hardline direction was reasserted and persisted until 1989. Scholars engaged in social-stratification research were accused of “revisionism” and such studies were de facto shut down, to be replaced by pseudo-research on the working class (*Literatura 1975*).

By contrast, in Poland, research on the social structure re-emerged as early as the mid-1950s and continued to develop in both theoretical and empirical areas. As Słomczyński and Wesołowski (1978a) summarized it, the process benefitted from the established tradition of such studies in Polish sociology, the rapid transformation of Polish society after the Second World War, and the impact of Marxist theory, which had already been rooted in the social sciences in the interwar period and only intensified after 1945. With a pleiad of outstanding personalities—to mention only Michał Pohoński, Adam Sarapata, Stefan Nowak, Stanisław Widerszpil, and Jan Malanowski—Polish sociology had the leading role among communist countries in providing internationally important research. As early as 1974, Włodzimierz Wesołowski organized the first international conference of the RC28 in the V4 countries in Jabłonna near Warsaw.

In Hungary as well, the conditions for stratification research were quite beneficial, although not so continuously as in Poland. The “period of silence” lasted up to 1961 (*Szabari 2005*) and “an ideological counterattack” occurred in the early 1970s (*Kolosi 1988*). Nevertheless, both national sociologies were soon resurrected, and Hungarian and Polish sociologists established fruitful cooperation and also provided stratification and mobility data for international research. Quite soon, East-West cooperation started and comparative studies of Poland and Hungary were published in Western journals. In 1984, Tamás Kolosi organized the RC28 meeting in Budapest. The renowned Hungarian sociologist Rudolf Andorka served as president of the RC28 board between 1986 and 1990.

Similar events were unimaginable in the former Czechoslovakia during the 1970s and 1980s. Georges Mink’s conclusions on sociologists in totalitarian and post-totalitarian regimes—that “(t)oward the end of the communist regime, sociology was neither entirely submissive or fully autonomous” (*Mink 2017: 21*)—should thus be carefully differentiated by countries. In contrast to the large degree of discretion allowed to Polish and Hungarian sociology, there was no such autonomy for sociological research in communist Czechoslovakia. While Polish sociologists could publish in the West beginning in the 1960s and their Hungarian counterparts somewhat later, the first non-émigré Czech sociologist (except *Machonin 1970*) to publish in the West after 1948 was Petr Matějů (*1990*).

After 1990, the transition to political democracy and a market economy led rapidly to the extensive social restructuring of societies and, simultaneously, regime change opened the door to free sociological research and easy cooperation with Western universities and scholars. Furthermore, Western sociologists were interested in analyzing this unique “social experiment” of transition. National sociological research teams and institutions in the V4 countries acquired new vigor, joined the international community, and started to participate in worldwide empirical survey programs. Following the meeting in Jabłonna in 1974, subsequent conferences of the RC28 in the V4 countries were organized in 1991 in Prague (by Petr Matějů) and in 1999 in Warsaw (by Krzysztof Zagórski).

In the next sections of this article, we will look—through Czech eyes—at empirical research on social stratification in the V4 countries from the 1960s on and then again after

1990. In the given space—and given our limited ability to capture such an immense amount of material—we will provide an overview of the main surveys and important publications. We pay more attention to social stratification itself than to social mobility and we also disregard the topics of educational and income inequality and mobility, which would each need a separate article. Similarly, we omit the immense Western research on communist countries from the time of the West-East divide until the collapse of these regimes.

Poland

Sociology developed as an academic discipline in Poland from 1918, when the Polish republic was re-established. Achievements in sociology were driven by efforts to develop the newly reunited nation as rapidly as possible (Szacki (ed.) 1995; Kraško 1996), and the discipline enjoyed state support throughout the interwar period. A sociological research center was started in Warsaw as early as 1920, and it devoted extensive study to the class structure of Polish society. The first census in 1921 was compared with data from 1914 to observe educational achievements, as measured by school attendance and the ability to read and write. Between 1920 and 1939, a number of research projects focused on the standard of living of the working class and the peasantry (Krauze & Słomczyński 1978).

Two different strands of social structure research developed in Poland. Józef Chałasiński, a student of the returned émigré sociologist Florian Znaniecki, focused mainly on modernization and other changes among the Polish peasantry (Chałasiński 1938). Ludwik Krzywicki (head of the Socio-Economic Institute in Warsaw, which was founded in the 1920s), initially focused on the empirical study of the problems of the working class (Krzywicki 1933), and his colleague, Stanisław Rychliński (1932), provided the theoretical foundations for such research. However, after 1939 and the disastrous events of the Second World War, with the Nazi and Soviet occupation of Poland, Polish academia disappeared in its entirety.

After the Second World War, a European-wide intellectual and political “turn to the left” occurred, either due to tradition or to political pressure. The social sciences in their restored form should be Marxist, and this also led to oppression and in consequence to an official ban on sociology for a couple of years.³ However in Poland, where the Marxist stream was strong even before, the ban was more rhetorical than real and many sociologists continued their work under the guise of other scholarly pursuits, that is, as philosophers or ethnographers. Even under the harsh Stalinist regime, some empirical research was still being produced, so long as it conformed to the official line (see e.g., Dobrowolski 1952; Hochfeld & Nowakowski 1953).

In the early 1960s, an original sociological reinterpretation of Marxist theory in regard to class structure, incorporating the modern concept of class interest, was attempted by Julian Hochfeld (1963) and his disciples (communist hardliners treated it as “revisionist”).

³ The history and developments of sociology in the V4 countries were described by an immense literature beginning by Wiatr ed. 1971 and (so far) ending by monographs of published in Palgrave Macmillan book series “Sociology Transformed” which also contains history of sociology in Czechia (Skovajsa & Balon 2017), Hungary (Karády & Nagy 2019) and Poland (Bucholc 2016).

Even before, a not Marxism-based book on class structure in social consciousness by Ossowski (1957) was ready to be published right after the reopening of academic sociology in Poland. In 1963, this important book was published in English and later in other major foreign languages. The author summarized and discussed the ideas of class appearing in various theories and perceptions of social structure throughout history. He also elaborated a new class scheme which included “middle” or “intermediary” classes, a concept somewhat similar to that proposed much later by Erik Olin Wright.

By the second half of the 1950s (thus a decade before any similar revival was observed in Hungary), sociology in Poland was already being re-accepted as an academic discipline. Significantly, the discipline was connected with the earlier national tradition also thanks to the fact that Stanisław Ossowski became the first President of the Polish Sociological Association and Jan Szczepański was the first head of the academic Institute of Philosophy and Sociology.⁴ The visit of Paul Lazarsfeld in 1958, as a Ford Foundation counsellor, provided an important impetus toward empirical research. Thanks to his recommendation, young sociologists were supported to visit the USA or other Western countries and other assistance was provided as well (Bucholc 2016; Kiliás 2020).

Later on, the thawing of the communist regime further encouraged Polish sociologists to enter the international scene of stratification research. A major topic concerned the differences between the socialist and capitalist system, which Wesołowski (1979, orig. 1964) addressed in a theory of social inequality. This outstanding scholar introduced modern sociological approaches and methodology to stratification research. Due to their strong personalities, Polish sociologists dared to put forward theoretical alternatives to Western concepts (Słomczyński & Wesołowski 1978a), and given the supply of survey data, they could present their research on social stratification to the international community.⁵

In the empirical field, many surveys were conducted, first in selected cities and then nationwide. In 1964–1967 Włodzimierz Wesołowski initiated a comprehensive stratification study based on representative samples of male heads of households in three Polish cities: Koszalin, Szczecin, and Łódź (Wesołowski & Słomczyński 1968). The study of Łódź continued till 1994 and resulted in a number of publications regarding the objective and subjective aspects of social inequality (for review see Słomczyński, Janicka & Wesołowski 1994).

In 1972, the Polish Statistical Office conducted, under the direction of Krzysztof Zagórski, what was to become a widely known survey of social mobility on a representative sample. At the same time, the Hungarian Statistical Office conducted a similar survey under the direction of Rudolf Andorka. These surveys were, and still are the largest in the world for their sample sizes (Zagórski 1976; Andorka & Zagórski 1979). The data revealed that social mobility was caused much more by the changing structure of the economy due to

⁴ Polish sociology was almost continually linked to the world sociological community, with top positions in the International Sociological Association being held by Poles: Stanisław Ossowski (vice-president, 1959–1962), Jan Szczepański (president, 1966–1970), Magdalena Sokółowska (vice-president 1978–1982), Piotr Sztompka (president, 2002–2006).

⁵ Regarding the huge number of works by Polish sociologists published in foreign languages only up to 1978 see Sulek 1978 and Sulek & Sulek 1980. Regarding the early comparative research see, e.g., Allardt & Wesołowski, eds. 1978.

industrialization than by the communist policy to “promote the working and peasant class” through the equalization of chances, as previously suggested by Pohoski (1964).

This data was also used for a Polish-American comparison, which proved that the level of education of parents played a more important role in people’s socio-economic achievement in state-socialist Poland than in the USA, while parents’ socio-occupational position was more important in the USA (Meyer, Brandon Tuma & Zagórski 1979). The Polish dataset was made accessible internationally and subsequently used by many authors for comparisons in regard to both inter-strata and inter-class mobility (see e.g., Erikson & Goldthorpe 1992). In the mid-1970s Erik Allardt and Włodzimierz Wesołowski (1978) organized a Finnish-Polish comparative project, of which a substantial part was devoted to stratification and mobility (Pohoski, Pontinen & Zagórski 1978).

After 1990, social stratification research flourished as a consequence of the events of the post-communist transition and by the possibilities once the East-Central European social sciences were fully opened to the West. In the 1990s, there was naturally a great increase in published research (see e.g., Szmatka, Mach & Mucha 1993; Słomczyński & Shabard 1997; Domański 1998). Research showed that socio-occupational structures had developed similarly to Western patterns, while it was rather culture and lifestyle that affected particular features of social stratification (Żuk 2008; Żuk, ed. 2010; Gdula & Sadura 2012). Comparative East-West research continued, for example, Kohn and Słomczyński (1990) tested the hypothesis that an individual’s position in the social structure had generally similar psychological effects in the USA and Poland.

Among other sources of data, researchers could mainly draw on the Polish Panel Survey POLPAN, which was first conducted in 1988, then (on a smaller sample) again in 1993. Thus, the key years of the post-communist transition and subsequent developments were covered in connection with a wide range of topics. The panel survey was further repeated every fifth year up to 2018. The data was used in an immense body of publications, partly also in two thematic issues (POLPAN 2012; POLPAN 2021). POLPAN data was also the primary source used in the comprehensive book *Dynamics of Class and Stratification in Poland* (Tomescu-Dubrow et al. 2018).

Conceptually, this summarizing elaborated volume formulates the specific characteristics of the “Warsaw school’s” approach to studying social class and stratification. Drawing on the work of Stanisław Ossowski, Julian Hochfeld, and Jan Szczepański, the approach was conceived by Włodzimierz Wesołowski as the integration of social class and strata perspectives, which represent relational and distributional approaches to the analysis of social structures. While the former focuses on relations of control and the subordination of certain social groups to others, the latter analyzes the distribution of commonly desired goods. In this approach, stratification is thus a consequence of class structure.

Hungary

The beginnings of sociology in Hungary date back to 1900–1901, when the first issue of a review, *Huszadik Század (Twentieth Century)*, was published, and the Society of Social Sciences, predecessor to the Sociological Association, was founded. However, the

economic and social underdevelopment of Hungary, as the eastern part of the Habsburg Monarchy, hampered any attempt to institutionalize sociology and conduct significant research (Fleck 2016; Karády & Nagy 2019). The post-World War I authoritarian nationalist regime was rather hostile to this discipline, considering sociologists of the time to be “unnational, communist, liberal and Jewish scientists” (Szabari 2002: 391).

Unlike in Czechoslovakia, during the communist regime in Hungary, sociology was set outside the sphere of Marxist “historical materialism.” Better conditions for its development in Hungary from the early 1960s on were due to the fact that “the Kádárist nomenklatura was more pragmatic than orthodox” (Karády & Nagy 2019: 96). Empirical sociology was first practiced in the Statistical Office, and from 1963 it was also conducted by the Group for Sociological Research of the Academy of Sciences, headed by András Hegedüs. In 1971, the Group was transformed into the Institute for Sociology of the Academy of Sciences, whose head became Kálmán Kulcsár. Sociology also developed at the Research Institute of the Hungarian Workers Party, headed by Tamás Kolosi.

Under the direction of Rudolf Andorka, sociological research developed in the Hungarian Statistical Office, and as early as 1963 a large survey on social stratification was conducted (KSH 1967). In the analysis of its results, seven social categories were constructed, basically according to the “the type of work,” but also as a combination of authority, knowledge, working conditions, and other characteristics (Ferge 1969). Later, Györgyi Várnai also used this data in a comparison with 1982 survey data to describe changes in the composition of the population by socio-occupational strata and also by indicators of well-being and cultural status (Ferge 2002).

In contrast to the open space for debate and research in the late 1960s and early 1970s, sociology in Hungary came under attack in the mid-1970s. The Department of Social Statistics at the Statistical Office was shut down and prominent sociologists were dismissed from their jobs. At that time, Iván Szelényi and György Konrád (1979) were investigated by the secret police after writing the book *Intellectuals on the Road to Class Power* in 1974. Yet before its publication, the manuscript generated a panic among the party authorities, and this feeling grew even stronger after the book was published abroad. The study, which was considered “revisionist,” advanced the thesis that in the socialist system members of the intelligentsia (bureaucrats, technocrats, professionals) who become communist party “apparatchiks” take advantage of the knowledge they possess to promote their own interests (Szabari 2005).⁶

Szelényi was ultimately expelled from the country in 1975, and he thus had the opportunity to become a professor in the USA and later an internationally renowned scholar (Verdery et al. 2005; Szelényi 2018; Demeter ed. 2020). While in exile, he could openly pursue his critical research on under-urbanization in socialist societies and the deficiencies of planned economies (Szelényi 1983, 1988). His colleagues in Hungary had to be more

⁶ Later on, this thesis was criticized as an overgeneralization by Polish sociologists who, in contrast, emphasized the critical attitudes of a substantial part of Polish intellectuals “on the road to dissent,” that is, they joined the anti-communist opposition (Frentzel-Zagórska & Zagórski 1989). Irrespective of this controversy, which might have arisen from national peculiarities and the somewhat different politics in the two countries, the whole discussion could be placed in the broader scope of considerations about the “new class,” which was occurring at the same time in the West.

cautious—while empirical stratification research did not much bother anyone, criticism of the communist administration and promotion of the intelligentsia were not allowed. Nevertheless, social stratification and mobility surveys were fielded again in 1973 and 1983. These enabled a realistic picture of Hungarian society and its changes over time to be drafted (Andorka 1982; Andorka & Kolosi (eds.) 1984).

Being in a position to apply standard sociological methodology and not being extremely limited by the regime, Hungarian researchers managed to enter the international scene and were able to collaborate with Western scholars early on, although not to the same degree as their Polish counterparts. In the early 1970s and even more in the 1980s, studies in English were being published in Hungary, and members of the international community could use Hungarian empirical data of a kind similar to the Polish data. Kolosi (1988) published abroad his theory of a late socialist social structure with a dual system of stratification governed by two different distribution systems: state redistribution and the market. By this time, the “traitor” Szelenyi had also been invited back to conduct research in Hungary.

This level of readiness meant that after the fall of the communist regime, Hungarian sociologists were able to develop and extend their research into social stratification and mobility in conformity with international standards and to collaborate with prominent Western scholars (see e.g., Lengyel & Róbert 2003; Róbert & Bukodi 2004; Németh 2007; and for cooperative research see e.g., Luijckx et al. 2002; Bukodi & Goldthorpe 2010). Several authors collaborated to produce a comprehensive picture of the long-term development of the social structure from the late 1940s to the late 1980s and to analyze the impact on Hungarian society of the collapse of the communist system in the 1990s (Andorka, Kolosi, Rose & Vukovich eds. 1999).

A systemic empirical account of changes in the Hungarian social structure in 1988–2003 was provided by Kolosi and Róbert (2004). They distinguished three phases of development: the transformation of the employment structure and a radical increase in social inequalities in the early 1990s, a less dramatic growth in inequalities, mitigated by the growth of the economy later in the 1990s, and lastly, an improved situation in the social structure with decreased inequalities given various social policy measures and the good performance of business players. Material improvements, however, were experienced more by the upper and lower strata than by people in the middle of the social hierarchy. Following a British survey (Savage 2013), Albert et al. (2018) drew the Hungarian class map on the basis of Bourdieu’s three forms of capital, and pointed to rising polarization, the separation of the elite and precariat, and the shrinking middle class.⁷

In the broad area of data collection, analyses, and reporting on Hungarian society, an important institutional player has been the TÁRKI Research Institute, which was founded in 1985 as an independent research body by Tamás Kolosi. Since 1990, TÁRKI researchers have been regularly participating in various international projects—currently, under the direction of István G. Tóth, and specifically in the area of social stratification and mobility, also Péter Róbert. TÁRKI was the leading institution in establishing the Hungarian Household Panel Study, which was conducted annually between 1991 and 1997

⁷ A similar survey was also conducted in Czechia in 2019 in cooperation with Czech Radio by a team of sociologists of various institutions. Its basic results have so far only been presented in public media (Czech Radio 2019).

(Tóth 1995), and then it established the TÁRKI Household Monitor Survey, which has been conducted once every two years since 1998, but not on a panel basis. In addition to its vast production of research and its participation in international projects, since 1990 TÁRKI has been publishing regular *Social Reports*, which also address social stratification and mobility.

Hungary, like Poland and certainly much more than the former Czechoslovakia, had already attracted the attention of Western sociologists in the socialist era. Albert Simkus wrote on social mobility in Hungary in his dissertation (1984) and continued to work with local researchers writing on education mobility in the long term, in comparison with the USA and the UK (Simkus & Andorka 1982). This interest intensified after the collapse of the communist regime: for instance, Szonja Szelényi (1998) analyzed the “socialist experiment” of equalization in Hungary, trying to identify the specific effects of socialist reform on inequality. The above-cited Luijckx et al. (2002) used retrospective information contained in large surveys to investigate the effects of economic and political change on social mobility in various periods, beginning with the early nineteenth century. In spite of the discontinuities between periods, the general trend from ascription to achievement prevailed even in the communist period.

Czechoslovakia

Czech sociology has a rich background within the V4 countries countries. It evolved out of the academic discussions and political clashes of the late nineteenth century and flourished in the interwar period, when regular university chairs, journals, associations, and research bodies in sociology were established (Nešpor 2011; Nešpor et al. 2014). After the Czechoslovak republic was instituted in 1918, the Czech advances were also exported to Slovakia, where in 1924 Czech scholars established a school of sociology at the Faculty of Arts of the new university in Bratislava (Nešpor 2013; Winclawski 1991). Whether it was in this connection or independently, prominent sociological figures thus also appeared in Slovakia.

Early writing on stratification in the former Czechoslovakia addressed such topics as the social prestige of occupations (Bláha 1925; Obrdlík 1937), changes in the social structure (Ulrich 1934), and the political consequences of these changes (Čecháček 1933). However, the early efforts could not continue in the later stages. The events of the Second World War considerably restricted Czech sociology and, though to a lesser degree, Slovak sociology as well. The communist takeover of power in 1948 led very soon to the complete demise of sociology, which was branded a “bourgeois pseudoscience” and expelled from universities, research, and public life.

It was only once sociology was allowed to exist as a discipline in the Soviet Union in the late 1950s, that it was able slowly to re-establish itself in Czechoslovakia. The Institute of Sociology of the Academy of Science, the Sociological Association, and university teaching were started only in 1965 (Voříšek 2012; Nešpor et al. 2014). Another reason the ruling communists tolerated the restoration of sociology was its potential use as an ideological weapon in clashes between communist-party cliques. The re-established

sociology had no ties to the pre-war traditions but drew inspiration from Polish sociology and mainly—although rather tacitly—from the West. Western research was smuggled into Czech and Slovak sociological production under the pretext of a “critique of bourgeois sociology.”⁸

In the area of social structure, the first main task set by researchers was to show the differences between the social structure in socialist and capitalist societies. One of the key advocates of this approach was the former Marxist ideologist Pavel Machonin. He started by refuting the Stalinist theory of the intensifying class struggle during the building of socialism (Machonin 1961), then he turned his attention to the social structure of socialist society in Marxist terms (Machonin 1966), and lastly he put together a team of young researchers and organized a large survey on social stratification and mobility in Czechoslovakia, which was conducted by the Statistical Office in 1967.

In survey design, five dimensions of social status were measured (complexity of work, education, income, political and cultural participation) and using these, six status groups were identified (Machonin et al. 1969; summary in Machonin 1970). The authors observed the marked “vertical differentiation” of society and stressed the status inconsistency between the complexity of work and education on the one hand and income on the other, but also between the former two and political participation.⁹ The survey, which was technically consistent with Western standards, had some deeper political connotations: Czechoslovak society was presented as a socialist parallel to advanced Western societies and, hand in hand with an empirical description of the social structure, the results contained a critique of the existing regime and aimed at reforms that would reduce wage equalization and increase social mobility.

After the Soviet occupation in 1968, sociological institutions and university teaching continued to exist, but they came under political and ideological control and much of the staff at the time was purged. Machonin’s institute at Charles University was shut down in 1969 and he was branded one of the “leading revisionists” and expelled from research. The Institute of Sociology of the Academy of Sciences was incorporated into a reorganized Institute of Philosophy and Sociology and put under political control. The head of the sociology section, the young mathematician František Charvát, wrote about social structure rather in terms of theoretical proclamations (Charvát 1975). Past approaches were put under severe ideological criticism (e.g., Hrzal & Popov 1972; Charvát et al. 1972; Zábřahová 1976).

Although empirical research on social stratification was considered improper during the two decades of “normalization” (1970–1989), two surveys about socio-class structure on

⁸ The first book on Western empirical sociology in post-war Czechoslovakia, by Klofáč and Tlustý, appeared only in 1959, followed by further informative volumes from the same authors in the mid-1960s (Klofáč & Tlustý 1965, 1967).

⁹ Machonin elaborated and empirically supported Gerhard Lenski’s concept of status inconsistency, and his efforts also had an effect on the preparation of a Hungarian survey in 1982 and its interpretation by Kolosi (1988). In contrast to this rather negative concept of status inconsistency, a positive view of it was formulated by Słomczyński and Wesolowski (1978b), who stressed the “complex” reduction of inequalities. In the perspective of global status, the high values of some elements can be combined with the low levels of others, for instance, low income with high prestige (intellectuals) and vice versa (low-skilled workers). Thus, various positions on individual status ladders do not engender discontent or frustration since they may compensate each other.

large samples were nevertheless conducted in 1978 and 1984, in cooperation of academic sociologists with the Statistical Office. However, researchers could use the data much later, when it had lost most of its significance due to rapid social change. This opportunity did arise after 1989 when sociological research began to develop again in conditions of freedom. Independent sociological institutions and bodies were re-established and research was fully opened to the West. Beginning by 1990, social inequality (including poverty, which was taboo under the communist regime), social stratification, and mobility once again became frequent topics of research.

Czech and Slovak Republics

The split of Czechoslovakia into two countries in 1993 did not affect developments in sociological research in any way, since Czech and Slovak sociologies had already had basically separate existences for decades. Machonin was nearly the only sociologist who cared about cooperation between Czech and Slovak researchers, as he had shown already during the preparation and analysis of the 1967 stratification survey. When Czechoslovakia was constituted as a federation of two countries in 1969, all the academic and higher education institutions were formally functioning independently. Even a comparison of these two societies alone in the post-split period is rare.¹⁰

In Czechia, there were two basic directions of stratification research in the academic Institute of Sociology, which was restored in 1990. One was Pavel Machonin's orientation toward describing various status components, following the mode he had practiced in 1967. He used the 1978 and 1984 surveys together with post-1990 data to present long-term changes in the social structure of Czech society within the modernization framework, which had strengthened the middle sections of the population (Machonin & Tuček 1996; Machonin, Gatnar & Tuček 2000). The other was the methodologically more analytical line of research led by Petr Matějů, who turned his attention to the formation of new elites, educational inequalities, distributional norms, and class voting (see e.g., Matějů 1996; Matějů & Hanley 1999; Matějů & Straková 2005; Matějů & Straková 2006; Smith 2010; Matějů & Smith 2011).

Together with Jiří Večerník, Matějů set up a team that aimed to produce comprehensive reports describing the large variety of social consequences of regime change and their perception in the population (Večerník & Matějů eds. 1999). A framing concept of the analysis was that of the middle class that "... should be viewed as a closing of the great gap in the social structure, which was left after the collapse of state socialism" (*ibidem*, p. 207). Večerník alone mainly researched the changing distribution of earnings and income in supposedly equalized Czech society, and he reported on various aspects of Czech society's development through the prism of social inequality and with reference to social policies (Večerník 1996, 2009).

¹⁰ Under the editorship of Večerník, a thematic issue of the *Czech Sociological Review* (no. 1 of 1993) was devoted to the split and its early aftermath. The last Czech-Slovak comparative survey titled "Strategies and Actors of Social Transformation and Modernisation" collected in 1995 documented less mobility and worse perception of social stranding in Slovakia against Czechia (Tuček & Harmadyová 1998). For a less recent Slovak-Czech comparison of social inequalities see Kahanec et al. 2014.

At the same time, social stratification studies have also been tackled by researchers working in the newly established Faculty of Social Sciences (Charles University in Prague) and Faculty of Social Studies (Masaryk University in Brno). Several national surveys were conducted and Czechs entered international survey networks. Thus Katrňák & Fučík (2010) could collect 28 surveys that contained mobility variables and had been conducted between 1990 and 2009 in order to support their thesis on the increasing association between the socio-occupation position and education of the respondents and their parents and, thus, on the increased social closure of Czech society.

Stratification research has also developed in connection with research on the family. In the early transition period, Možný (1991)—following Bourdieu—explained the easy fall of the communist regime by family reasons: in order to be able to convert their social capital and disposition rights into real and thus inheritable property, even the established elites were interested in removing the regime. More recently, several researchers have focused on specific problems of marriage, partnerships, and the reproduction/strengthening of inequalities (see e.g., Kreidl 2012; Hamplová 2020). Social stratification was also treated from the perspective of the critical sociology represented by the very prolific sociologist Jan Keller, who wrote about social inequalities but mostly in general terms, with only partial focus on Czech society (see e.g., Keller 2000, 2010).

In Slovakia, sociological research on social stratification has progressed since the early 1990s, when numerous articles on the subject were published using mainly the EGP class scheme (see e.g., Bunčák & Harmadyová 1993; Bunčák et al. 2011). In 2016, the Social Stratification and Mobility in Slovak Society survey was conducted on a sample of 3,600 respondents. Its results were presented first in a sourcebook (Džambazovič, Gerbery & Sopóci 2018) and then in a comprehensive book containing a historical section in which statistical and sociological data were used to map the long-term development of Slovak society since 1910. The authors conclude that

We can try to draw conclusions from observing the social stratification of Slovakia in three time periods—in 1910, 1967 and 2008—that is, each approximately half a century apart. Generally speaking, the long-term development of social inequalities in Slovakia is a success story. In other words, Slovakia was able to move from the outskirts of the former Kingdom of Hungary where it was in around 1910, closer to the territories of the Austrian Monarchy, all in terms of the social stratification system and other macro-societal indicators. This social change, which encompasses the social stratification system as well as other macro-social indicators, occurred during the life of three to four generations of its population (Sopóci, Gerbery & Džambazovič (eds.) 2020: 67).

Comparative Research since 1990

Comparative research on social stratification and mobility in the V4 countries started with the collaboration of Hungarian and Polish scholars (Andorka & Zagórski 1979; Kolosi & Wnuk-Lipiński (eds.) 1983). A workshop on social structures in Eastern and Western Europe was organized by the UNESCO European Coordination Centre for Research and Documentation in Social Sciences, headquartered in Vienna (Niessen, Peschar & Kourilsky eds. 1984). Much later, Czechoslovakia was also involved, thanks to an initiative of the Dutch sociologist Jules Peschar (1990), who was very active in launching an East-West comparison. Other Dutch sociologists were interested in social

stratification research in East-Central Europe as well (see e.g., Ganzeboom, De Graaf & Róbert 1990).

In 1987, the outstanding Austrian scholar Max Haller organized an important meeting in Graz, at which Hungarian, Polish, and Czech sociologists presented national and comparative papers, some even crossing the East/West border. The most important papers and other contributions were published in 1989 in three issues of the *International Journal of Sociology* and then in a comprehensive volume (Haller ed. 1990). Aside from the general and single-country chapters, the volume also contains comparative chapters on the changing role of education in the Netherlands and Poland (Mach & Peschar 1990), educational attainment in Czechoslovakia and the Netherlands (Matějů & Peschar 1990), and social mobility in Austria, Czechoslovakia, and Hungary (Haller, Kolosi & Róbert 1990).

The regime change that occurred after 1990 opened the door to international cooperation. It became possible for East-Central European sociologists to present their findings in person in the West without encountering any obstacles (e.g., Szmatka, Mach & Mucha 1993). Western sociologists interested in the post-communist transformation were stimulated by the new opportunities to study and explain the specific features of the V4 societies. Since then, the literature on the post-communist transformation has been immense and also includes studies on the integration of East-Central European sociology with the European context (see e.g., Nedelmann & Sztompka (eds.) 2011; Keen & Mucha 1994, 2004a, 2004b).

Around the same time, it also became possible to collect comparative data. This opportunity was seized by two outstanding personalities in sociology, Iván Szélenyi and Donald J. Treiman, both of whom were at the time working at the University of California in Los Angeles. An ambitious project, “Social Stratification in Eastern Europe after 1989” (SSEE), was prepared and financial resources were collected to support large surveys (3,500–5,000 adult respondents) in Bulgaria, Czechia, Hungary, Poland, Slovakia, and Russia in 1993, and in 1994 in Poland. These scholars also conducted a survey on samples of about 500 members of the old elite and about 500 members of the new elite in each of these countries, except Slovakia.

The SSEE project involved local scholars from all the participating countries. These scholars helped design the survey, coordinate the fieldwork, and analyze the data: Pavel Machonin and Petr Matějů in Czechia; Rudolf Andorka, Tamás Kolosi, and Péter Róbert in Hungary; Henryk Domański, Kazimierz Słomczyński, and Edmund Wnuk-Lipinski in Poland; and Ján Bunčák in Slovakia. On the US side, young scholars such as Szonja Szelenyi, Gil Eyal, Eva Fodor, Eric Hanley, and Eric Kostello later wrote a great deal about the post-communist transition.

The SSEE survey was not only unique in terms of the size of samples but also in terms of the wealth of information it provided. However, the outcomes fell short of the original aims. The largest use of the SSEE database project was an additional questionnaire targeting the old and new elites. With its partial use, Eyal, Szélenyi and Townsley (1998) presented a theory that post-communist capitalism has been shaped by an alliance between technocrats (representing monetarist policies) and intellectuals (representing civil society) rather than any “true capitalists” (capital owners). The formation of this “bloc of power” made it possible to establish capitalism from above, under the direction of “enlightened elites.”

Using the same source, Matějů and Hanley (1999) showed the strong path dependence of elite circulation after 1989 in the mobility that had occurred in the last decade of the communist regime and had led to improving the competency of the elites, thus increasing the likelihood of their surviving the transition to a market system. According to their analysis, high-mobility Hungary contrasts with low-mobility Czechia. Hanley and Treiman (2005) distinguished two elite career paths that existed in former communist societies. While higher education was a more important determinant of recruitment to professional positions, communist party membership was a more important determinant of recruitment to cadre positions.

Nevertheless, the use of the main SSEE survey was far from negligible. Domański (2000) demonstrated the similarity of transition societies with Western countries in patterns of inter-generational mobility, socio-occupational structures, and other aspects of stratification. Various articles, for instance, by Hanley and Treiman (2004), found that regime change substantially restored pre-communist property relations, as property holdings had either remained intact throughout the communist period or were restituted to the original owners or their heirs. Róbert (1997) investigated the social determination of living conditions in post-communist countries; Verhoeven et al. (2008) studied the income advantages of Communist Party members and argued that they managed to maintain these advantages even in transition.

Another comparative—although much smaller—project, involving the collection of original data and describing the early transformation in the V4 countries, was the “Social Consequences of Transition” (SOCO) conducted in 1994. The international team of this project was organized by the Institute for Human Sciences (IWM), headquartered in Vienna, and under the direction of Zsuzsa Ferge. The surveys were conducted on a sample of 1,000 households each in the V4 countries (and later also in the former East Germany) and included retrospective questions concerning the social status of the respondent’s family at various times in history. This survey was used less than had been expected (Ferge et al. 1997; Kovács (ed.) 1996; Večerník 1996).

After the East/West barrier was removed and the integration of the post-communist countries into international survey networks had progressed, the need to collect regional survey data evaporated. After 1990, the V4 countries one by one joined large projects and networks that provide comparative data—in particular, the “Social Inequality” modules of the International Social Survey Programme (ISSP), but also specifically targeted surveys such as those collected in relation to the EUREQUAL project, which was directed at the impact of inequality on democracy and the market in 12 post-communist states of Central and Eastern Europe (Whitefield & Loveless 2013).

Using ISSP data, perceptions of social inequalities and justice were also investigated in a comparative perspective. Austrian scholars (Riedl and Haller 2014; Haller and Hadler 2019) used the 1987–2009 waves of ISSP modules on social inequality to compare the V4 region with Austria and Western countries. As they stated, while the V4 countries share the same legacy of state socialism, they differ in their specific paths of development since 1990. Nevertheless, people in all these countries perceive current income disparities as much too large and support redistribution policies. In comparison with Austria, the V4 populations—and among these, especially the Hungarians—see their societies as belonging less to the “middle-class type” than do most Western societies.

Other projects made comparisons across the East-West boundary, such as, in particular, the “Growing Inequalities’ Impact” (GINI) Project. Various available data was sourced for methodological and country-specific papers focusing on income/wealth and education inequalities and their social, political, and cultural impacts (see Nolan et al., eds., 2014, including country-specific chapters and a summary chapter of Tóth 2014). Tóth and Medgyesi (2021) provide a rich overview of trends in income and wealth inequalities in Central and Eastern European countries. Making vast reference to the literature of individual countries and using international data, the authors observe considerable convergences in income levels but also important differences between the CEE countries in regard to inequality in income and well-being during the post-communist transition and post-2009 crisis periods.

The common approach applied in survey-based analyses of socio-occupational structures was challenged by David Ost’s initiative to reinstate class analysis, which had been marginalized or even displaced by sociologists in the post-communist region in favor of a functionalist approach (Ost 2015). Ost edited the EEPSC special issue on *Class after Communism*, which contained a dozen essays on countries of Central and East-Central Europe and tried to “assess how the topic and concept of class has been used in public and scholarly discourse since 1989” (ibidem: 544). The contributors of V4 and other countries pointed out the absence of class analysis which was replaced by taking social inequality as a functional system, corresponding to the market order.

In many contributions to this EEPSC issue, a critical stance was taken against the middle-class perspective, which “... played a prominent role in the sociological discourse—not just as a subject of research, but also as a rallying cry” (Drahokoupil 2015: 578). Indeed, after 1990 the focus on the middle class—which had been taboo under communism as an expression of refusing the Marxist class schema—has “enjoyed a spectacular career.” However, it has not done so without criticism: Domański (2015) stressed the specific cultural features of the Polish middle class; Tóth and Szelényi (2019) demonstrated the growing closure of the upper part of the Hungarian middle class; and Večerník (1999 and 2009) pointed to unfulfilled expectations regarding the Czech middle class during the post-communist transition.

Conclusion

This article was conceived pragmatically as an overview of empirical research on social stratification in the countries currently grouped in the Visegrád Four (V4). This immense research field is viewed through “outsider” Czech eyes. We, the authors, admit our limitations in regard to collecting information and providing a thorough picture of the state of affairs. Given the quantity of publications in this area, the task, which had seemed large, turned out to be enormous—it was next to impossible to sort the concepts, provide an inventory of the surveys, and assess the approaches and contributions of individual authors writing on social stratification. We were forced to relinquish our original aims and will conclude only by describing the amount of research produced in this area by national sociologies.

There are considerable differences in the intensity of social-stratification research in individual V4 countries, especially between Poland and Hungary versus Czechia and Slovakia. What might be the reasons? Poland is a much larger country than the latter two, with several well-established sociological research centers. Hungary is about as large as Czechia and has rather fewer institutions—but this is overbalanced by the enormous activity of the TÁRKI institute. In regard to traditions of sociological research, they are no less long in Czechia than in Poland, although the Polish scholars have traditionally had more openness to the world. The reasons for the difference between the countries might be found first in the barriers the communist regimes placed on the social sciences (which had after-effects in the post-communist era) and second—although we advance the suggestion only very tentatively—in the character of these societies in regard to social inequalities and the related urgency of inspecting them.

During the communist period, sociology was oppressed and politically controlled in all the V4 countries, but its complete ban in Poland and Hungary was only short. The same concerns sociologists' contacts with the West. In contrast, during the past seventy years in former Czechoslovakia the discipline underwent two nearly twenty-year-long periods of forced non- or limited existence. The two breaking points—February 1948 (the Communist seizure of power) and August 1968 (the Soviet occupation)—were followed by emigration waves that each included many sociologists. And—unlike their Polish and Hungarian counterparts—the Czechs and Slovaks in exile were deprived of any contact with their homeland.¹¹ The libraries in former Czechoslovakia were purged of any “problematic literature” and the blockage in regard to the West was complete after 1948 and also very severe after 1968.

In regard to the second reason, Czech society was traditionally more equal and without strong social conflicts—this could possibly make sociology relatively “less needed” than in neighboring countries. However, the Communist Party's promises to preserve small employers and farmers (who massively contributed to the CP victory in the 1946 Czech elections) were broken and those groups were heavily attacked and removed instead. Thus, perhaps sociology became “more dangerous” for the communist regime than in the other countries. In addition, the Czechoslovak economy did not benefit from communist industrialization politics (as elsewhere) but rather the opposite. In sum, there was—relatively and hypothetically speaking—neither such an urgent need to inspect inequality problems nor the willingness to tolerate research on the impact of those vital changes in the real social structure.¹²

In contrast to the frequent contacts of Polish and Hungarian sociologists with the West (which were established very soon in Poland and later in Hungary), their Czech

¹¹ This is not to say that Czech émigré sociologists did not take important positions in Western universities or academia (see portraits of twenty of them in [Petrušek 2011](#)). As for their specific contributions to social stratification research, see [Krejčí 1972](#) and [1976](#), [Kende & Strmiska, eds. 1984](#). Unlike Polish and Hungarian émigré sociologists, Czechoslovak ones in both the post-1948 and post-1968 waves were deprived of national citizenship, and they could neither return nor did they have any possibility of contact with local researchers until the end of the communist regime.

¹² We should also stress the long survival of the Stalinist regime—be it attenuated—in former Czechoslovakia. Its visible symbol was the giant statue of Stalin in Prague. This greatest group sculpture in Europe was erected in 1955 and removed only in 1962.

and Slovak counterparts had no such contacts throughout the 1970s and 1980s. Just shortly before the communist regime's breakdown, Petr Matějů, following his 1987 stay at Wisconsin-Madison University, established contacts with a number of Western researchers. Social-stratification research expanded only after 1990, thanks to an apparent need, new opportunities, and the newly available data. A debate was fed by competition between two teams and approaches: the "old school" of Machonin and the "new school" of Matějů, both at the Institute of Sociology of the Academy of Sciences.

While Machonin at the end of his career turned back to theory (Adamski, Machonin, and Zapf 2002), Matějů for the last time made an empirical analysis of the effect of personal attractiveness and self-confidence on mobility and life success (posthumously, Matějů et al. 2017). In the meantime, social stratification research was also taught and conducted in the newly established Faculty of Social Sciences of Charles University in Prague and in the Faculty of Social Studies of Masaryk University in Brno. Nevertheless, during the post-1990 decades, many fewer publications on social stratification have been produced in Czechia and Slovakia than in Poland and Hungary. The same is also true in regard to the participation of Czech and Slovak sociologists on the international scene.

Since the 1950s, the outstanding role in the V4 countries thus belonged to Polish sociology, which managed to keep the links with its pre-war traditions and coped relatively well with balancing Marxist theory with empirical study of the "really existing socialist society." Polish sociologists were the last from the European countries falling to Soviet rule to be forced to quit the international sociological community after the descent of the Iron Curtain, and they were again the first to reenter it successfully. They reconciled and developed social class and social status perspectives, Marxist and Weberian approaches. Foremost in this regard was Włodzimierz Wesołowski, who is considered the founder of the "Warsaw school of studying social class and stratification" (Tomescu-Dubrow et al. 2018).

In Hungarian sociology, no continuation of pre-war research traditions occurred, but it can be assumed that Hungary's having had great thinkers in the social sciences—such as Karl Mannheim, Karl Polanyi, and György Lukács—had an influence on the later efforts of Hungarian sociologists, particularly Iván Szelényi. One of Szelényi's specific contributions to the concept of social structure is a stress on the "power status of intellectuals" (instead of the fictitious leading role of the working class), which he had already formulated in regard to "socialist society" (Szelényi & Konrád 1979). Twenty years later, under different conditions and applying Bourdieu's theory of capitals, Szelényi presented the intelligentsia—side by side with technocrats/managers—as a driving force in "making capitalism without capitalists" (Eyal, Szelényi & Townsley 1998).

It is largely but not fully true that "East Europeans tended to ignore each other, captivated as they were only by developments in the West" (Gábor Kovács quoted in Karády & Nagy 2019: 94). It is true that since the resurrection of sociology in communist countries, "Eastern" sociologists have sourced "Western" concepts and methodology, beginning with socio-occupational classifications and ending with tools of data analysis. The relative openness of Polish and Hungarian sociology to the West was also supported by researchers informally serving as "ambassadors" of their native country—in particular, Iván Szelényi, Kazimierz M. Słomczyński, and Krzysztof Zagórski. Nevertheless, we cannot neglect the important bilateral cooperation that also occurred: first between Polish and Hungarian

sociologists from the early 1960s on, and second—thanks to yet other scholars, such as Max Haller and Jules Peschar—by joining other post-communist countries in comparative research.

To conclude, let us quote what Saar and Trumm (2018: 154) stress in their analytical overview of approaches to social stratification in Central and Eastern Europe: “(t)he main challenge is to incorporate the concepts of power, exploitation and domination perspective into studies of economic inequality.” The new approaches overarch sociology and political science to cast new light on social structure by capturing the regime from above. Szelényi and Mihályi (2020) made use of this approach in their *Varieties of Capitalism Perspective* on post-communist countries, as did Magyar and Madlovics (2020) in their design of different power pyramids in post-communist trajectories. This is another picture of social stratification—not empirical and survey-based but more theoretical and political science-oriented.

The socio-occupational-based social stratification surveys and domination-based explanations of political regimes are not fully complementary, but they are not mutually exclusive either. Thus, they could be—and probably also will be—developed in parallel. There are also other approaches, such as a multi-dimensional construction of real social categories (not necessarily vertical) or lifestyle-based typologies in which the core of differences is transferred from the occupational to the leisure area. In regard to the “traditional concept” of social structure, which uses socio-occupational classifications and inspects a wide range of living conditions, a large opportunity for comparative analyses is provided by the annual European Union Statistics on Income and Living Conditions (EU-SILC) survey introduced by Eurostat in 2005. The survey is already being used for empirical research on social stratification (Večerník 2022).

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