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CONTACT
Address: Sociální studia, Fakulta sociálních studií MU, Joštova 10, Brno, 602 00
E-mail: socstud@fss.muni.cz

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Editorial

Experts and Expertise in the Public and Political Sphere

Jitka Wirthová, Tomáš Dvořák

The processual approach raises the long-vexed question of "value-free inquiry" in a particularly pressing manner. Processual ontology makes it evident that all the "empirical realities" of social life are in fact congealed values of one sort or another. (Abbott 2016:229)

Social Imaginaries of Expert Advice on Public Issues

Historically, the idea of the correct relationship between expertise and politics has drawn on the modern ideal of rational public decision in increasingly complex societies (Dewey 2016 [orig. 1927]). Through this, the application of expertise as a science-based and truth-seeking activity is pulled into the realm of activity based on deciding good and evil for a given community; rationality is pulled into the realm of normativity. Through this lens, it is possible to observe conflicts in a particular way, whether as those endangering the truth due to "political" interference in research or endangering the public's free and democratic decision due to expertocracy that closes any discussion. Both of these critiques are grounded in the shared assumption of naturally distinct fields of activity (science and politics) and, moreover, in the unproblematic treatment of normative claims of truth and the common good. However, at least for two decades, there have been sociological observations that point to the rather interconnected and relational nature of both spheres, objecting to their natural borders and statics (Abbott 2016; Sheller 2004; Turner 2015). Nevertheless, these relational and processual approaches have never become mainstream in understanding the relationship between expertise and politics.

From the modern era onward, science has been seen as a more or less secure solution to societal problems. We can see three peaks of this imaginary: the first in the interwar period of technocratic solutions to decadent modernity, represented by successful industrialists (Jordan 1994), the second in the 70th scientific-technological revolution, which was aimed at the scientification of human lives (Sommer, Spurný, and Mrňka 2019), and the third, after 2010 (Ansell and Geyer 2017), with calls for evidence-based public decisions. Interestingly, this imaginary has survived all the postmodern attacks of the 1980s and 1990s.

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But it must be remembered at the same time that the debate about expertise is understood differently in the two contexts of the "West" and the post-socialist countries of the Central and Eastern European region (CEE hereafter). In the latter region, sociological and historical knowledge about the specific relationship between expertise and the public sphere has been immersed in the normative debate about catching up with the West (Dvořák and Wirthová 2024), and circumvented older and more critical debate about the utopian character of rational expert politics (Oakeshott 1962).

Preferences for expertise advising politics flourished mainly in post-socialist countries of the CEE, where it approached from two sides, from the very citizens exhausted from ineffective government (Bertsou and Pastorella 2017) and from western reformers helping post-communist countries by means of the application of expert knowledge and neoliberal solutions (Kopeček et al. 2019). Thus, the idea of expert solutions to public problems became part of the debate about the transformation from a dismal post-communist state to a better democracy. There still persist some theoretical obstacles that presuppose expert knowledge to have, on the one hand, fixed, universal, and normative qualities, and, on the other hand, the public sphere to have a fixed, universal, and normative content and location. Both the normativity of the good public sphere and the natural difference between expertise and public interest, nevertheless, have governed most research and public policy up to today. However, this rather closes the possibility of taking such normativity and the difference between expertise and public interest as sociological or historical questions.

In this special issue, we take the assumed division between expertise and the public sphere as a matter to be explored by sociological or historical analyses – and we take inspiration from the recent spatial turn in social sciences, which has dynamised the relation between knowledge and space-time (Allen 2016; Massey 2005; Sheller and Urry 2003). For this special issue, therefore, we also invited authors to look at the problem of expertise related to the public sphere and public issues in processual, historical, relational, and topological ways. Our aim was to shed light on the social processes at work in the relationship between expertise and the public sphere and normativity with respect to the activities of experts recognising and implementing the common good. The particular focus is on these phenomena in mutual relationships in the CEE region and across a rather broad historical span.

In this introductory paper, we begin with a critical confrontation of the idea of separated realms, arguing that it is misleading to focus on conflicts between expertise and politics as a zero-sum game in which the winner takes all and always enslaves the loser for its own purposes. On this basis, we develop the main argument that the history of expert solutions to public issues is much longer and constitutes a common ground for the legitimation of both communist and (neo)liberal worldviews by technocratic or expertocratic arguments. The final section is devoted to an overview of papers to invite readers to learn how the authors of each paper approach the above issues.

Expertise and the Public are not Separated Realms

Low trust in political institutions, ineffective economic management, falling standards in education, and global warming and climate change are all deemed to be pressing public

issues. That is, they are not merely personal issues but common challenges that can only be faced by people together; these are necessarily political. Also, what is required besides collective action is the intervention of experts, who would assist by providing the truth (facts) about the respective problems.

From one point of view, however, the case is not of whether an expert will enter the public issue or not, since expertise is already involved. The expertise has already entered these public issues into the public arena, since, without the expertise, such public issues would not exist. First, the public issues mentioned above are not untouched by experts, because such issues have already been made public through the process of the relational mingling of expertise and politics. For example, low trust in public institutions, so much discussed in post-communist countries, is a public issue made apparent through longitudinal surveys; falling standards in education are statements through the statistical work carried out by hired analysts at the Organisation for Economic Co-operation and Development (OECD); global warming is a phenomenon defined and described by climate scientists over several decades. From the other point of view, the opposite is true: the political and the normative are involved in expertise before it can describe the true state of affairs. Expertise in post-socialist regions, originating from transnational political or economic organisations such as the European Union, the World Bank, or the OECD and designed to help nation-states transform from communism to democracy, has inscribed in itself political programmes, which, as more critical research has shown, were not innocently presenting, but rather reproducing political neoliberal ideals (Gorur 2015).

Our key argument is that the assumption of two radically opposing realms should be problematized and rather the subject of research itself. Combining both of these vectors (expertise→politics and politics→expertise) means acknowledging the original relationality and not looking for its "origin" – this would only reinforce the idea of naturally separated realms. Rather, we invited the authors of the present papers to think about this issue theoretically and to explain such relationality either sociologically or historically. To reflect the citation in the introduction, we can say with Andrew Abbott that the facts of expertise are congealed values (Abbott 2007, 2016), and simultaneously, we add that the values within a public issue are congealed facts. The political is already involved in the scientific and vice versa, and societal problems and the expertise to solve them are not separated realms of social life. In other words, a kind of expertise is already involved in the very shape of the problem as we are used to knowing it. In many current public issues it is almost pointless to search for the originator, not only because we cannot see that far back in history, but also above all because both political and scientific activities have always been connected. Contemporary sociology itself shows that these activities cannot be ontologically (at the level of social relations) separated; only for the purposes of heuristics, can they be separated analytically.

To prevent misunderstanding, we treat these public issues as real public issues, as many people have invested a great deal of energy in defining and solving them. However, the aim of this introductory paper and the collection of papers that follows is to understand predominantly the relationship between public and political, not only the particular public issue. The aim is not to decide political disputes but to point to the relationship between public issues and expertise through interdisciplinary scholarship.

The Long History of "Expert" Governance – Communist Legacies and the Present

This special issue aims to analyse the processual and historical character of normativity and the reality of expert/ technocratic claims. We want to explore both historical and contemporary technocratic aspects and the functioning of the political and public spheres.

One significant inspiration comes from the historical debate on the nature of technocratic governance under socialism. When the social sciences think about the legacy of communist regimes in the region of Central and Eastern Europe, expert governance is seen as something contradicting the communist era and its ideological character of politics. However, several particularly historical reflections on the continuity between expert governance under communism and present technocratic tendencies have emerged in recent years (Kopeček 2016; Sommer et al. 2019). Kopeček et al. (2019) introduced a thesis on the continuity between late communist governance legitimised technocratically and the neoliberal political and social transformation after 1989, which objected to the mainstream understanding of neoliberalism as imported to CEE from the West. The thesis is that although there was an overall social and economic transformation of Eastern European societies, the previously present emphasis on expert governance permeated the newly democratizing societies and combined with a strong emphasis on neoliberalism. Rather than an inevitable collapse of the communist regime and a rapid transformation to neoliberalism, the author argues that the change of political system was, in fact, much more gradual and involved continuities in expertocratic imaginaries within industrial and economic organisations. In this special issue, mainly the papers by Sommer and Štefek address these economic cases.

This latter thesis finds support in the analyses by Sonia Hirt, who added another important thread of continuity to this development from communism to neoliberal capitalism, which is the tendency of people under a totalitarian regime to resort to private spheres, resulting in a culture of individualism likely congruent to neoliberal individualism. In particular, her concept of privatism (Hirt 2012), including the link between individualism and technocracy, seems to persist in current public spheres in CEE. Especially in post-socialist countries, where the public sphere was driven by ideology, the more real sphere seemed to be the hidden, publicly invisible, private sphere. This situation influenced a great deal of social scientific reflection on the "unreal public façade" (Rupnik 1984) and the "real underground" (Havel 2018). Therefore, formal public positions are not granted much legitimacy, and, therefore, there is a lack of legitimised public positions to act in the name of collectivity; actors must put much more energy into achieving affirmation and support from the general populace. In our previous study (Dvořák and Wirthová 2024), we enhanced the understanding of the transformation from communism to democracy by analysing the different boundaries between politics and the public sphere in a CEE country and a Western one. Although the communist regime's legacy is a strong mistrust of politics, it does not mean that this mistrust overlaps with public issues and undermines democracy as an ideal. This is addressed particularly by Dvořák in this issue.

However, this general tendency to prefer expertocracy has not only been scrutinised by historical approaches, but has also been questioned by critical social sciences, which are inherently sensitive to normative pre-conceptions of optimism about experts entering

the public sphere. Either concealing mere political opinion in empirical "objective" research (Abbott 2001) or rendering normative advice quickly from empirical data (Gorur 2015; Ruppert 2012), the CEE region was in many historical circumstances subjected to both of these normativities (Silova 2002). In this respect, current evidence-based policies as a universal panacea for "mistaken" developments in public services and/or the "ill" public/political sphere may be an example. Objection to such objectivity and consequential normativity is nothing new in social science, but current shifts in the character of both the public sphere and expertise beg even more nuanced conceptual and ontological approaches.

In summary, long-term changes carry with them many continuities that have consequences for difficult-to-observe changes at the boundaries between the political, public and expert spheres. Therefore, the question of who is (or was) in the position of expert and on what basis becomes a sociological one. This pertains to the struggle between managers and politicians during the normalisation era, as well as to the post-transformation period, with respect to both managerial and educational expertise. There may be expertise to solve a problem, but there is also expertise to raise awareness of the respective issue. Who is in a position to assume this expertise becomes an important question as the nature of expertise becomes its own public issue, especially in the CEE region. Where and how the expertise is produced and to what extent the context is politically dependent are crucial.

Overview of Contributions

This special issue consists of five papers; one paper covers broadly the topic of attitudes to technocracy in CEE regions, while the two remaining topics – the salient political tokens of industry and education in public debate in Czechia and Slovakia after transformation – are each covered by two papers. In both of these latter areas, expertise was challenged and moved to various places and into the hands of various actors. Both can be partly seen as successive; debate about the transformation of industry took place during normalisation and the 1990s, and the debate about educational reform took place after the 2000s. Hence, the ordering of the individual articles in this issue is chronological. We start with an overview study, then we discuss normalisation and transformation cases, and end with the most recent ones. The papers collected in this special issue function as probes into fascinating topics that govern our contemporality. Hopefully, they invite discussion and inspire further inquiry.

The first paper, "Why Are We Still Technocrats? On the Sources of Technocratic Attitudes in Post-Communist Region of CEE" by **Tomáš Dvořák** is a historical overview of technocratic attitudes. It opens the discussion with the question of why, in the post-socialist countries of CEE – in contrast to Western countries and for such a long time and so intensively – the values of technocratic government at the expense of politics prevail. The results of his analysis, based on survey data, show that the popular preference for technocratic governance, common across CEE countries, is primarily associated with disaffection with the transformation of political institutions. At the same time, it is not a manifestation of anti-democratic attitudes. Rather, technocracy is perceived as an instrument of democratic politics – as an antidote to democratic malfunctioning.

This is followed by a study of the managerial governance of industrial organisations, immersed in the conflict between expert and political managers that developed in a communist regime, during the so-called "normalisation" after the collapse of the Prague Spring in 1968. **Martin Štefek** conducted his research at a ceramic plant in Czechia for his paper "Expertise and Conflicts in State Business Management during the Era of 'Normalisation' in Czechoslovakia: Pluralism or Corporatism?" Štefek shows how socialist industrial managers were placed in multiple centres of power, which were influencing expertise and management – specifically, the ministries, societal organisations, and both local and central organs of the Communist Party – and how they navigated the difficult relationship between expertise and politics. For example, the fact that the production plan was set by the government, along with many actors on the margins, e.g., professional Party apparatchiks, demonstrates the various modes of expertise-politics relations. The study by Štefek brings new insights into the historical origins of the social conflict that pertains today as a result of the transition from communism to democracy immediately after the revolution.

This transition is an important part of the following studies, although they differ in their empirical cases. The historical situation after the collapse of communism in CEE countries was consequential for both the development of a different form of public sphere (Bernhard 2020), and the adoration of a specific kind of expertise (Porter 1995). The newly-developing relationship between them had serious consequences, e.g., invisibilising critical public debate and moving it to the margins (Wirthová), creating a dependence on international statistical data in the face of a lack of sufficient data at the local level (Kaščák), or neutralising the communist past of many managers by legitimation through expert management of the economy (Sommer). In all these cases, it can be said that the taken-for-granted boundaries between the public sphere and expertise in mainstream research are challenged.

Following the case of multi-faceted, expertise-politics relations in industrial organisation during normalisation, is another study of industry, but this time during the collapse of the communist regime, the demise of central planning, and the transformation to capitalism. The paper "Industrial Management and the Crisis of Managerial Expertise in Economic Transformation: A Case Study of the Czech Footwear Industry" by **Vítězslav Sommer** shows that the activities of managers in the era of economic transformation, their long-term plans, and their momentary decisions were the result of a complex and ambivalent interaction of continuities and discontinuities in managerial expertise and practice. The collapse of the communist regime and concomitant arrival of liberal cultural and economic order did not affect the existing technocratic order in companies, which had already been established by the politics of expertise in late socialist industry and which paradoxically had arisen because of a crisis in managerial expertise based on discredited central planning.

Similarly to industry, which was a political token during the transformation period, education can be understood as a new political token today. Education is seen as a major solution to many societal problems (Depaepe and Smeyers 2008), which also places a burden on education, its organisations and actors. However, the declared importance of education does not always bring economic, social or even expert autonomy (Biesta 2019). Therefore, this special issue concludes with two educational cases in the context of the contestations between politics and expertise.

In his paper "Thank God for the OECD – Modalities of Expertise in Current Education Policy in Slovakia", **Ondrej Kaščák** shows how expertise that has moulded politically-proposed systemic and curricular education reform in Slovakia has acquired specific features. The politically- and economically-driven call for educational reform from the European Union Recovery Programme after COVID, called NextGenerationEu (2021), has been recontextualised in Slovakia and this has set specific conditions for the kind of expertise required. Navigation is mingled in a truly messy situation marked by many contradictory imaginaries: numerocracy and all-pervasive sociometrics, which appeared in Western countries in the 1980s and which was transferred to the CEE post socialist region; older communist quantifications and planning; rising mistrust in organised science after Covid; removal of the older social reports from expertise; and a dependence on statistical international data from the OECD and the EU. This, Kaščák contrasts with the Nordic region, where expertise is moulded from national expertise and expertise based on secondary interpretations of data from international comparisons.

Our special issue concludes with the question **Jitka Wirthová** poses in her paper "The Hollowing-out of the Public Sphere or its Re-spatialisation? A Topological Probe in the Case of Expert Advice to the Education System", in which education is again a political token. It relates to the key focus of this issue – the assumed natural borders and contents of the public sphere and the supposed natural scientific foundation of expertise. By means of an empirical study of the auditing endeavours of an educational NGO, she points to a current significant change. Expertise is not about knowledge and scientific method, but explicitly about political influence. Relatedly, a public issue, a degrading school system in her case, is crafted on the basis of statistical data and other types of knowledge that follow the much-criticised audit culture. In such a situation, a critical public can only appear on the margins of public debate, that is, where the roles of experts and those to be reformed are negotiated. However, she also emphasises the historical process of this development, namely the precarious position of civic and non-government organisations in-between the closed and silent private sphere and state bureaucracy after 1989.

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THEMATIC BLOC

Why Are We Still Technocrats? On the Sources of Technocratic Attitudes in the Post-Communist Region of CEE

Tomáš Dvořák

ABSTRACT The aim of this paper is to explore the sources of technocratic attitudes; that is, attitudes that support expert-driven governance. The aim is to focus on the post-communist countries of CEE, as support for technocracy in politics is higher in CEE compared to Western European countries. The analysis shows that people living in CEE countries see expert governance as compatible with democracy and also see it as a way to improve the functioning of democratic institutions. The results show a different pattern compared to Western European countries, where technocracy is perceived among the people as an alternative to democratic governance as such.

KEYWORDS technocracy, post-communism, democratic attitudes

Introduction

The aim of this chapter is to address the question of what (in terms of survey variables) can explain the strong public support for expert governance in the post-communist countries of the CEE region. Strong popular attitudes in favour of expert governance emerged in post-communist CEE countries as early as the 1990s. Thus, this special issue chapter will take a general look at the causes (or correlates to be precise) of technocratic attitudes among the public in the period of social and political transformation in the post-communist region of CEE.

The general motivation for studying the sources of technocratic attitudes is twofold. First, in recent years there have emerged in historical and social science literature analyses related to technocracy in political governance. It has been argued that strong technocratic tendencies on the level of elite governance existed in CEE countries already under communist regimes and became part of the neoliberal governance by political elites in the democratic transition period as well (Kopeček et al. 2019; Sommer, Mrňka, and Spurný 2019). In other words, it is argued that technocracy was not only characteristic of late communist regimes, but on the elite level remained influential also in the newly-established democracies after 1989. Second, technocratic attitudes have also been present among all populations across CEE countries. The fact that technocratic attitudes to governance have been strong in the post-communist CEE region is highlighted, for example, by the European Values Study

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from the late 1990s to the present: Post-communist countries of the CEE region are in this sense significantly more technocratic, with a much stronger preference for expert governance compared to people living in WE countries (Bertsou and Pastorella 2017).

The aim of this paper is thus to explore the sources of these technocratic attitudes. The focus of this article is two-fold. First, I will explore what the sources of technocratic attitudes across CEE countries are. Here, I also look at whether the sources of these attitudes differ compared to WE countries. Second, I will consider the extent to which support for technocratic governance can be regarded as a manifestation of a relationship with the previous communist regime. The main analysis regarding the sources of technocratic attitudes will focus on EVS data from 2008 and 2017. However, this data will be complemented with analysis from 1999 EVS data to evaluate whether attitudes towards the former communist regime may explain some of the popular support for technocratic governance. The 1999 EVS data are used for this purpose because they include questions on the assessment of the communist regime, which are no longer included in subsequent (2008 and 2017) waves of EVS research.

Technocracy in the Post-communist Region of CEE

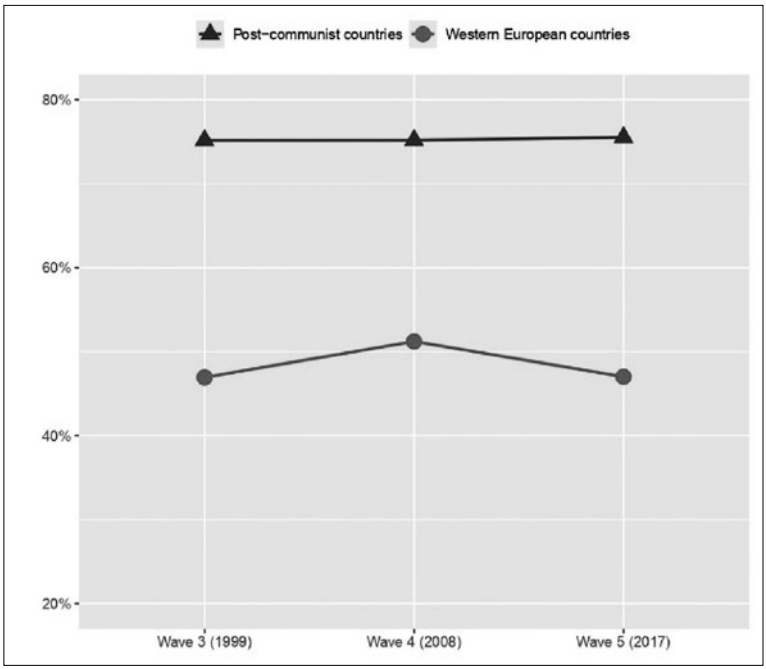
In what follows, I present the research problem and the current state of research about the attitudes to technocratic governance. The EVS data and variables used in the analysis are presented in the methodological section.

Research Problem

The fact that technocratic attitudes are strongly present in the post-communist countries of the CEE region was first pointed out during the early social and political transition of these countries to liberal democracy shortly after 1989. Some scholars suggested that the technocratic aspects of the newly-emerging political governance across CEE countries resulted from the democratization process (Centeno 1993; Saxonberg 1999). It seemed, however, that these technocratic tendencies would only be associated with the initial phase of democratisation. It is therefore somewhat surprising when comparative analyses from relatively recent times point to the fact that CEE countries still share a very strong preference for technocratic governance among their populations (Bertsou and Pastorella 2017). There is a very strong division between WE and CEE countries in this regard. Furthermore, these attitudes have tended to be quite stable over a long time period. Figure 1 shows the division using EVS data from 1999 until 2017. The figure shows the share of those showing strong or moderate support for technocracy: Post-communist countries have been systematically and in the long term more in favour of technocracy compared to those of WE.

The current debate about the nature of technocratic attitudes provides only limited insight and discussion about why this gap exists and what is driving the CEE population towards these types of attitudes. In what follows, I first examine how technocracy relates to democracy as a system of governance. Next, I focus on what the technocracy debate has been about in post-communist countries and present the current debate among social scientists regarding sources of technocratic attitudes. Finally, hypotheses are derived from this discussion.

Figure 1: Technocratic attitudes in WE and CEE in the 1999–2017 period (EVS waves 3–5). Chart shows strong and moderate support for expert governance



Note: Post-communist countries include Albania, Bosnia-Herzegovina, Bulgaria, Belarus, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Moldova, Montenegro, North Macedonia, Poland, Romania, Kosovo, Russia, Slovenia, Slovakia and Ukraine; Western European countries include Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Switzerland, Spain, Great Britain (GB), GB-Ireland, the Netherlands, Luxembourg, Malta, Norway, Portugal and Sweden.

Technocracy and Its Relation to Democratic Governance

In the social sciences, technocracy is conceptualized and understood in two rather incompatible ways. First, in the tradition of sociological and political theory, technocracy is understood as an undemocratic and authoritarian form of governance. For example, the Habermasian view tends to regard technocracy in these terms (Habermas 2015). But in contrast, technocracy can also be viewed as a democratic form of governance that includes a strong role for non-elected experts and expertise. In this paper, I use the latter understanding. That is, technocracy is considered as a modification/dimension of democracy and not as a strictly anti-democratic form of governance. In this sense, technocratic governance represents both one dimension of democracy and an opportunity to adjust it.

However, it is just one of many ways to modify democratic governance. For example, it has been discussed what the role of the people should be in terms of *participatory*

opportunities to influence governance. Also, the principle of *deliberation* may be emphasised. Power may shift in a democracy to religious or military actors. What democracy means is not given in advance but depends on how people in a given country or context understand it. And this question of what democracy should mean is a frequently explored empirical question. It addresses what other (participatory, expert, deliberative etc.) dimensions people associate with democracy. And this applies not only to the post-communist countries of the CEE region, but also to the developed countries of Western Europe: Technocratic attitudes emerge systematically in empirical analyses of democracy as a distinctive dimension of democratic government irrespective of country context (Hibbing et al. 2023; Pilet et al. 2024; Del Río 2024).

Interestingly, the concept of technocracy is relatively close to the concept of stealth democracy (Hibbing and Theiss-Morse 2002), which also emphasizes the role of expert governance instead of politicians. In the concept of stealth democracy, the element of "non-self-interested decision makers" is also present. Stealth democracy is characterized, like technocracy, by the expectation of non-political solutions. However, stealth democrats also support more direct forms of political participation such as direct democracy, referendums etc. (Hibbing and Theiss-Morse 2002). Stealth democracy is, therefore, not just about non-political governance, but includes also an emphasis on direct political participation. Thus, the concept of stealth democracy is broader than technocracy. The difference also lies in the fact that the concept of stealth democracy can also involve a demand for the increasing role of successful businessmen and economic elites, rather than independent scientists and experts as in technocracy (Hibbing et al. 2023). The following analysis examines the concept of technocracy rather than stealth democracy, which is based on a different operationalisation.

Why Do People Want Expert-driven Governance?

Empirical analyses of why people support technocracy usually look for reasons in evaluations of democracy. If technocracy stands as a modification of, or alternative to democratic governance, then it is logical to look for its sources in dissatisfaction with democracy. The question then is what dimension of democracy such discontent stems from.

It is usually thought that it makes sense to distinguish two dimensions of democracy in this context (Easton 1975): (1) the level of support for democracy as a form of governance—that is, democratic legitimacy, and (2) satisfaction with the functioning of specific democratic institutions (e.g., parliaments, political parties). The former has been described as diffuse support, the latter as specific support.

This logic is generally followed, for example, by Bertsou and Pastorella (2017: 443), who show that both low perceived diffuse support for democracy (low evaluation of a regime as a means of governance) and low specific support (a low level of trust in democratic institutions) are sources of support for technocratic governance. Technocracy in governance is desired by people who are dissatisfied with the democratic regime as an idea as well as by people who are dissatisfied with the functioning of political institutions. Similar results were also confirmed by other analyses (Bertsou and Caramani 2022). These two dimensions

of dissatisfaction should also apply in CEE countries. These are countries that have been characterized in past decades precisely by significant dissatisfaction with various aspects of democracy (Pop-Eleches and Tucker 2017). It is logical to expect that this would also manifest itself in technocratic attitudes. This is what Bertsou and Pastorella (2017: 445) argue when they claim that the high incidence of technocratic attitudes in post-communist CEE is linked to the legacy of communist regimes and an inability to establish functional citizen-state relations during the new post-1989 democratic period.

A second source of technocratic attitudes should be political ideology. Although technocracy is by definition apolitical, research shows a relatively strong statistical correlation with right-wing attitudes (Bertsou and Pastorella 2017; Bertsou and Caramani 2020). The stated reason for this connection is that technocracy is relatively close to neoliberal ideology, which emphasizes an orientation towards market efficiency, personal responsibility, and so on. Here, too, the results can be related to the post-communist countries of the CEE region. Neoliberal reforms introduced after the fall of the communist regimes in 1989 were carried out by technocratic elites, experts previously influential in such communist regimes (Kopeček et al. 2019). In other words, the technocratic tendencies already present during communism (especially its late phase) survived into the transition period and supported the introduction of neoliberal policies that began to be implemented across the CEE countries (Hirt 2005). Therefore, technocratic governance in post-communist countries could also be associated with right-wing (economic) attitudes, especially as a consequence of the strong application of neoliberal policies during the transition periods of these societies (Hirt 2012).

In addition to these attitudinal sources of technocracy, the influence of socio-demographic factors has also been mentioned, albeit usually attributed a rather minor role. For example, education or socio-economic status has been identified as influential—the higher the economic status and education of citizens, the greater the support for technocracy. This was interpreted by social dominance theories as a desire on the part of the upper and middle classes to maintain the status quo and their own dominance (Chiru and Enyedi 2022). However, other empirical research does not regard these effects as so strong or convincing (Bertsou and Caramani 2022).

Debate about Technocracy in Post-communist CEE

The above sources of support for technocratic governance should or could also logically apply in post-communist CEE countries. However, certain ambiguities and contradictions should be mentioned.

It is possible to associate technocracy with neoliberalism and right-wing politics because of the emphasis on market economics in the transformation of post-communist economies and societies. However, technocratic tendencies already existed in these societies before the (post) communist revolutions of 1989. In fact, technocracy was relatively widespread in the communist regimes of Central and Eastern Europe and gained momentum particularly in the late phases of these regimes (Sommer et al. 2019). Of course, it cannot be said that these regimes were primarily technocratic, but they did contain strong technocratic tendencies at the level of governance (Hübner 1999). So, if the authoritarian/totalitarian socialist regimes

of Central and Eastern Europe applied technocratic elements in governance, it is possible that this connection was carried over into the democratic era. Thus, technocracy may be associated with leftist attitudes in the economic sense and state socialist attitudes in particular. This does not mean that the link between technocratic attitudes and right-wing economic values should not exist either; both options can be present. There may exist heterogeneity here: some social groups will have technocratic attitudes associated with the (economic) left and others with the (economic) right.

Political ideology is also related to the question of the influence of the legacy of communism. Even after the fall of the communist regimes across CEE in 1989, there remained relatively strong sympathy for the communist regime in many post-communist bloc countries (Gherghina 2011). Various sources (Červenka 2024; Pew Research Center 2019) report relatively stable levels of sympathy for the communist regime over the long term, reaching one-fifth of the population—with the caveat, of course, that these figures vary according to the specific context within CEE. The key reasons for this "nostalgia" for communism have been the perceived advantages of the socialist political system and attitudes favouring the socialist centrally-planned economy (Gherghina and Klymenko 2012). And it is reasonable to hypothesize that this attitudinal package may include technocratic attitudes as well. Thus, although in Western democracies, technocracy is associated with right-wing ideology, for CEE countries it is possible to associate it with left-wing attitudes. Moreover, technocratic attitudes may also be a manifestation of communist nostalgia, because the main reason for this nostalgia is the communist state-socialist mode of political-economic governance, which contained technocratic tendencies.

Third, analyses of the sources of technocratic attitudes generally point to the influence of negative attitudes towards democracy in general and dissatisfaction with the functioning of democratic institutions (Bertsou and Pastorella 2017). However, it is possible that in postcommunist CEE countries specifically, technocratic governance may be perceived as a way to improve the functioning of the democratic system. In particular, in cases of state dysfunction, bureaucratic-technocratic governance may be posited as a form of governance well-equipped (or viewed that way) to improve the functioning of the state and provide social welfare. This is essentially about regime performance (von Soest and Grauvogel 2017). Indeed, people in transition countries undergoing democratization expect their standard of living to be at least the same as in the previous regime (Neundorf 2010). If the new regime is unable to provide this, technocratic governance may be regarded as an attractive alternative. It was pointed out that in Russia, for example, strong technocratic emphasis in governance began to be applied as a reaction to the failure of the state to ensure a decent standard of living and functioning state and public services during the first phase of the social transformation in the 1990s (Huskey 2012). In other words, for countries undergoing a democratic transition, technocracy in governance may represent an attractive option to improve the outcomes of these regimes; that is, technocracy need not be perceived as being in direct conflict with democracy.

Finally, in recent years, so-called technocratic populism has also begun to be discussed in post-communist countries. The point here is that technocracy should be associated with illiberal tendencies in the post-communist CEE region. This alleged erosion of democracy should manifest itself specifically in technocratic populism—populist

parties that exhibit a technocratic ideology (Aprasidze and Siroky 2020; Domaradzki and Milosavljević 2021; Drápalová and Wegrich 2021; Havlík 2019; Semenova 2020). It is supposed to be political parties that combine populism with technocracy as a "host" ideology. In this sense, however, it is not a manifestation of technocracy in the true sense of the word—for example, according to its use by apolitical experts in government and decision-making. It is rather the use of expert or managerial discourse—for example, in the sense of the promise of the Czech ANO party to run the state like a business company (Havlík 2019). In this context, research has recently focused on how populist politicians have used technocratic expertise to manage the COVID-19 pandemic (Guasti a Baboš 2022).

In summary, the sources of support for technocratic governance (i.e., governance by experts) are seen primarily in the perception and evaluation of democratic governance and its various dimensions. Right-left political attitudes also have a role to play. It is also possible to consider the influence of nostalgia for communism as a partial source of technocratic attitudes. Finally, some demographic variables may also play a role, although their influence does not seem to be very strong or consistent.

Data and Methodology

Data from the European Values Study (EVS) was used for the analysis. This is a survey that takes place approximately every ten years; i.e., in 1999, 2008 and 2017. In what follows, the key concepts and their measurement are presented. These are followed by the creation of hypotheses.

Key Concepts and Their Measurement

The concept of technocracy is conceptualised in this analysis as follows. I draw on an approach that measures technocracy in terms of citizen preference for depoliticized decision making. This stated and declared preference is used as a proxy for the underlying technocratic attitudes (Bertsou and Caramani 2020). The preference for technocracy was thus measured by the following survey item: "Having experts, not government, make decisions according to what they think is best for the country". Here the question concerns the application of expert governance at the national political level. Sometimes technocracy is measured at the level of sub-domains (local politics, European level, specific spheres) or in the context of authoritarian regimes (Xiao 2003). Nonetheless, this operationalization should be appropriate for the comparative analysis of countries that is carried out in this paper. Importantly, this operationalisation also contains important key features for technocracy such as anti-pluralism and elitism. That is, decision-making is derived from the judgement of experts and not of 'the people' or politicians, etc. (Bertsou and Caramani 2020). The respective variable from the EVS survey was also used in the past to measure technocratic attitudes (e.g. Bertsou and Pastorella 2017).

Second, if a key source of the support for technocracy is dissatisfaction with democracy, the key question is what dimension of dissatisfaction is mostly associated with democracy. In this sense, there has been a long debate in political science, usually tied to the notion

of *democratic support*, about what people are or can be (dis)satisfied with in a democracy. There are indeed many approaches (Linek 2016; Torcal and Montero 2006), and I select one of them here, especially in view of the following theoretical discussion.

In general, the debate on democratic support is based on the idea that we can distinguish between diffuse support (democracy as a principle of governance, the so-called legitimacy of democracy) and specific support. The latter refers to how a given regime is experienced and how satisfied people are with particular institutions (Easton 1975). However, as the scholarly debate in recent decades has shown, the problem is more complex and other dimensions of democratic support can be distinguished (Linek 2016). For the purposes of this analysis, three dimensions of the people's relationship to the democratic regime in which they live will be distinguished.

The first dimension is so-called democratic legitimacy. That is, support for the principles of democracy regardless of the reality of its implementation. The second dimension is so-called individual disaffection. This dimension refers to a personal relationship to politics in terms of distance and alienation. It is measured on the basis of feelings of (political) powerlessness or the relevance of politics to one's life. The third dimension is political discontent. This relates to the evaluation of specific institutions at a given moment— how the government or parliament is performing, what the specific outcomes of governance are, etc. Usually, this dimension is measured in terms of the level of trust and confidence in specific political institutions. These three dimensions (Linek 2016) will be tested empirically.

I measured *democratic legitimacy* by the following item: "Having a democratic political system – Would you say it is a very good, fairly good, fairly bad or very bad way of governing this country?" *Individual dissatisfaction* is measured by the level of subjective interest in politics: "How interested would you say you are in politics?" Finally, *political discontent* is measured by the level of trust in political parties, government and parliament. These three were combined into one variable (omega-within=0.820; omega-between=0.985) (Geldhof, Preacher, and Zyphur 2014).

Next, left-right ideological positions are often tested on the basis of subjective positioning. The problem is that this approach combines two dimensions: economic and cultural—and both influence what is perceived as left or right (de Vries, Hakhverdian, and Lancee 2013). For this reason and due to the theoretical discussion where it was pointed out that technocratic attitudes should be related mainly to the economic dimension of left-right attitudes (Hirt 2005), a subjective self-positioning variable was not included. Instead, only the economic dimension of political left-right was included. Thus, two variables entered the analysis. The first measured attitudes towards economic inequalities: "Where would you place your views on this scale? Incomes should be made more equal X We need larger income differences as incentives". The latter measured attitudes towards the degree of state intervention in society and the economy: "Where would you place your views on this scale? Individuals should take more responsibility for providing for themselves X The state should take more responsibility to ensure that everyone is provided for". These two variables measured the economic dimension of right-left attitudes (Otjes 2018). Finally, these two variables could not be combined into one variable due to lack of reliability tested by multi-level omega (omega-within=0.378; omega-between=0.386).

The final important concept included is the relation to the previous communist regime. This attitude to communism was measured by the following survey item: "Where on this scale would you put the political system as it was under the communist regime?". The motivation to include this item stems from studies pointing to the role of nostalgia for communism, ressentiment towards the communist regime, and convictions about the advantages of the communist-style of governance. It also included technocratic elements in the governance of the former regimes, which could also be a source of technocratic attitudes.

Hypotheses and Regression Model

The analytical strategy of this study was as follows. To test the hypotheses formulated below, a multilevel regression model was used. Countries only from the CEE region (and in some analyses also those from the WE region) were included and the dependent variable was the preference for technocratic governance. The following three hypotheses were formulated.

First, the three dimensions of democratic support were tested. The assumption here is that support for technocracy is related and stems from the evaluation of democratic regimes. So, dissatisfaction with some dimension of democratic governance should be associated with technocratic attitudes.

H1a: The weaker the fundamental support for democracy as a mode of government, the stronger the support for technocracy (democratic legitimacy).

H1b: The greater the subjective distance from politics in a democratic regime, the higher the support for technocracy (individual disaffection).

H1c: The stronger the distrust in political institutions, the stronger the support for technocratic governance (political discontent).

The second hypothesis is focused on the association between technocratic attitudes and left-right ideological positioning. I included attitudes showing position on the (left-right) economic dimension measured via two variables: the assessment of inequalities in the given society and the attitude to state intervention in the society. These are regarded as indicators of two dimensions of the economic cleavage (Otjes 2018).

H2a: *The stronger the view of inequalities as legitimate, the stronger the support for technocratic governance.*

H2b: *The weaker the support for state interventionism, the stronger the support for technocratic governance.*

The third hypothesis is focused on the evaluation of the previous communist regimes.

H3: *The stronger the positive retrospective view of communism, the stronger the support for technocratic governance (the communist nostalgia hypothesis).*

I also included the following control variables in the analysis. (i) countries as fixed effects, (ii) gender (1=male, 2=female), (iii) age of the respondent in years, (iv) educational level as measured by the ISCED scale, and (v) income level of household.

The countries included in the main analysis (2008 and 2017 EVS waves) are the following: Albania, Bosnia, Bulgaria, Belarus, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Macedonia, Montenegro, Moldova, Kosovo, Poland, Romania, Sebia, Slovakia, Slovenia and Ukraine.

Since the dependent variable was on an ordinal scale, the R package "Ordinal" and the CLMM (Cumulative Link Mixed Models) command were used to fit the model. In the analysis, the attitudinal variables in particular were found to have some missing values. For the purpose of analysis, these missing values were recoded to the mean of the scales. However, the regression results (see below) were identical in terms of statistical significance, no matter whether the missing values were replaced or not.

Results

The results of the multilevel regressions for CEE countries are presented in Figures 2 and 5. Figure 2 shows the results of the multilevel regression model testing hypotheses H1 and H2 based on EVS data from 2008 and 2017.

None of the socio-demographic control variables were statistically significant. Neither gender, age, education nor income level were found to have any statistically significant effect.

Figure 2: Multilevel ordinal regression. Predictors of technocratic attitudes. CEE countries. EVS data 2008 and 2017

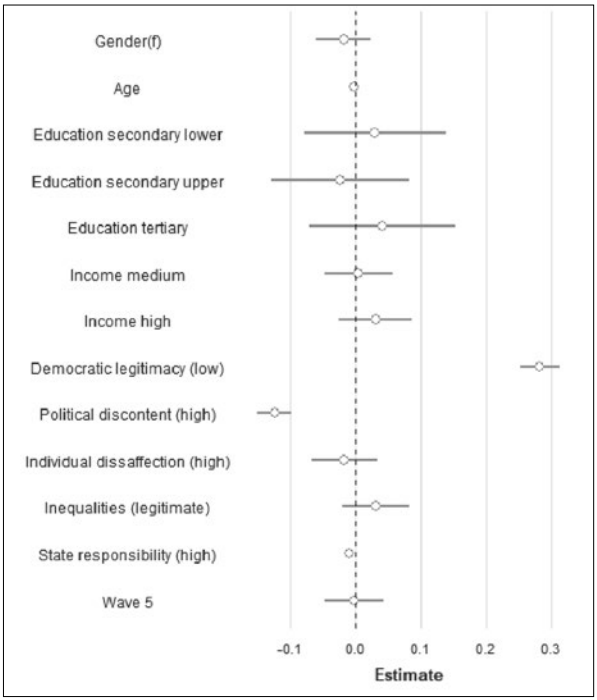
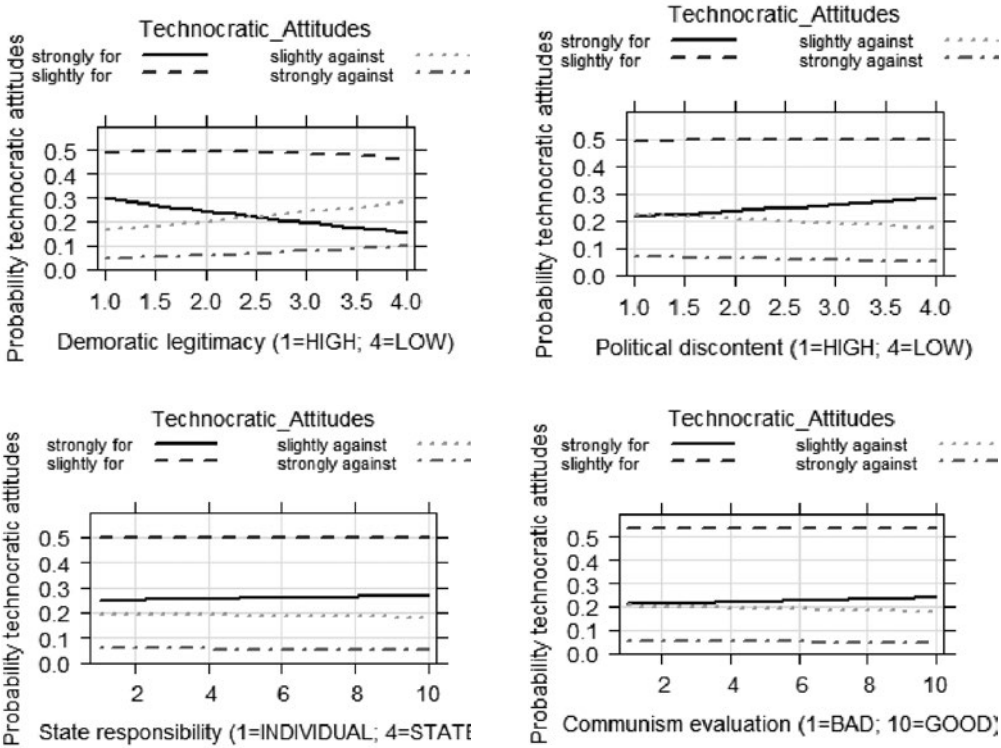


Figure 3: The effect of (a) democratic legitimacy, (b) political discontent, (c) state responsibility and (d) evaluation of communism on technocratic attitudes



With respect to democratic legitimacy and political discontent, these variables were found to be clearly statistically significant. In other words, technocracy is supported by those who believe in democracy as a way of governing but are dissatisfied with particular democratic institutions. Technocracy, in the sense of involving experts in government, is thus seen as a way of improving governance in a democracy. This means that hypothesis H1c was confirmed. Hypothesis H1a was rejected but the mechanism was found to work in the opposite direction to the one expected. The size of these effects is shown in Figures 3a and 3b. The effect of both factors is quite substantial. As for the variables tested by hypothesis 2, attitudes to inequalities were not statistically significant; thus H2a was rejected. However, the effect of attitudes to state intervention was found to be significant, albeit in the opposite direction to the one expected: Those who favour more state intervention are more likely to have stronger technocratic attitudes. However, as seen in Figure 3c, this effect is very small.

These results for CEE countries differ quite significantly from what is known about support for technocracy in WE countries. First, in WE countries, technocracy should be

Table 1: Multilevel regression. Technocratic attitudes as dependent variable. Ordinal regression based on EVS 2008 and 2017 data. Signif. codes: '***' 0.001 '**' 0.01 '*' 0.05

	Model 1	**Model 2**	**Model 3**	**Model 4**	**Model 5**	**Model 6**
Gender (f)	-0.030 (0.010)	-0.016 (0.014)	-0.027 (0.014)	-0.027 (0.014)	-0.029 (0.014)*	-0.029 (0.014)*
Age (years)	0.010 (0.000)***	0.007 (0.000)***	0.007 (0.000)***	0.007 (0.000)***	0.008 (0.000)***	0.008 (0.000)***
Education (ref. basic)						
lower secondary	0.080 (0.030)*	0.075 (0.033)*	0.083 (0.033)*	0.085 (0.033)*	0.085 (0.033)*	0.085 (0.033)*
upper secondary	0.090 (0.030)**	0.072 (0.033)*	0.093 (0.033)**	0.096 (0.033)**	0.095 (0.033)**	0.095 (0.033)**
tertiary	0.160 (0.030)***	0.124 (0.034)***	0.157 (0.034)***	0.162 (0.034)***	0.159 (0.034)***	0.159 (0.034)***
Income (ref. low)						
medium	0.060 (0.020)**	0.054 (0.018)**	0.057 (0.018)**	0.059 (0.018)***	0.060 (0.018)***	0.060 (0.018)***
high	0.140 (0.020)***	0.130 (0.019)***	0.135 (0.019)***	0.139 (0.019)***	0.141 (0.019)***	0.141 (0.019)***
Political variables						
Democratic legitimacy (low)	0.020 (0.010)*	-0.291 (0.017)***	0.026 (0.011)*	0.024 (0.011)*	0.027 (0.011)*	0.027 (0.011)*
Political discontent (high)	-0.160 (0.010)***	-0.143 (0.010)***	-0.197 (0.013)***	-0.158 (0.010)***	-0.158 (0.010)***	-0.158 (0.010)***
Individual disaffection (high)	-0.030 (0.020)	-0.023 (0.022)	-0.027 (0.022)	-0.026 (0.022)	-0.024 (0.022)	-0.054 (0.022)
Inequalities (legitimate)	0.020 (0.020)	0.019 (0.022)	0.021 (0.022)	0.020 (0.022)	-0.004 (0.022)	0.026 (0.022)
State responsibility (high)	0.000 (0.000)	-0.002 (0.003)	0.001 (0.003)	0.007 (0.004)	-0.001 (0.003)	-0.001 (0.003)
Country	-1.250 (0.180)***	-2.209 (0.180)***	-1.467 (0.191)***	-1.187 (0.184)***	-1.478 (0.186)***	-1.476 (0.186)***
Wave 5	0.010 (0.020)	0.026 (0.016)	0.006 (0.016)	0.006 (0.016)	0.006 (0.016)	0.006 (0.016)
Interactions						
Democratic legitimacy* country		0.590 (0.022)***				
Political discontent* country			0.080 (0.019)***			
State responsibility* country				-0.011 (0.006)*		
Inequalities* country					0.042 (0.007)***	
Individual disaffection* country						0.042 (0.007)***
Observations	68990	68990	68990	68990	68990	68990
Log Likelihood	-82587.49	-82239.73	-82578.56	-82585.43	-82566.67	-82566.79
Akaike Inf. Crit.	165210.98	164517.46	165195.11	165208.85	165171.34	165171.58
Number of countries	42	42	42	42	42	42

supported by those who disagree both with democracy as a form of government as well as those dissatisfied with the functioning of particular institutions (Bertsou and Caramani 2022; Bertsou and Pastorella 2017). Results from CEE show that general support for democracy works in the opposite direction: technocracy is quite strongly associated with general support for the principles of democracy and therefore compatible with it. The second difference is less surprising and less substantial. In CEE, technocracy is slightly more associated with state interventionism (a dimension of the economic left-right scale), while in WE it is associated with neoliberalism and an emphasis on personal responsibility rather than state intervention.

It is therefore possible to check whether these differences between WE and CEE derived from the existing literature are also present in EVS data from 2008 and 2017. Countries from the WE region were thus added to the analysis. A cross-level interaction was included between a variable distinguishing between CEE and WE countries (contextual-level) and variables testing hypotheses H1 and H2. The respective analysis is presented in Table 1. The table shows the interaction effects for each variable that was tested in hypotheses H1 and H2. Figure 4 shows the strengths of these effects. In interpreting the results of these interactions, it is important to note that although Table 1 shows that all of these interactions are statistically significant, not all of the differences between the CEE and WE regions are significant in substantive terms. The large size of the total sample leads to even small differences being statistically significant. However, if we look at the differences between WE and CEE countries in terms of substantive differences, the following three results stand out (see Figure 4).

First, the results confirm that indeed in Western European countries technocracy is supported by those who oppose democracy as an ideal. The direction of the mechanism (democratic legitimacy) is thus reversed in the case of WE and CEE countries. Second, in terms of the effect of political discontent, the effect of this variables is in the same direction in WE and CEE, albeit stronger in WE. Finally, the effect of the assessment of inequalities is also different in CEE compared to WE. In CEE, those who view existing inequalities as not legitimate are more likely to hold technocratic attitudes compared to those in WE.

Finally, using data from 1999 it was tested whether the retrospective evaluation of the communist regime had any effect on the support for technocracy. As shown in Figure 5, this variable was significant but not particularly strong. Those who evaluate the previous regime well are more likely to support technocracy as a form of governance, but only slightly. The effect is substantially quite weak (Figure 3d).

Thus, overall, hypotheses H1a (in the opposite direction), H1c, H2b (in the opposite direction) and H3 were confirmed. However, the effect of the two latter variables was only small. Thus, the results can be summarized in the sense that technocratic governance is primarily driven by two factors: dissatisfaction with the functioning of specific democratic institutions and confidence that technocracy is compatible with the principles of democracy. Furthermore, the influence of more economically left-wing attitudes and support for the past communist regime was shown, but this influence was only very tentative. Nevertheless, this combination of technocratic attitudes with leftist values stands out when compared with WE countries.

Figure 4: Cross-level interaction effects with contextual country level variable (CEE x WE). Interaction of country with (a) democratic legitimacy, (b) political discontent, (c) state responsibility, (d) political disaffection and (e) inequalities

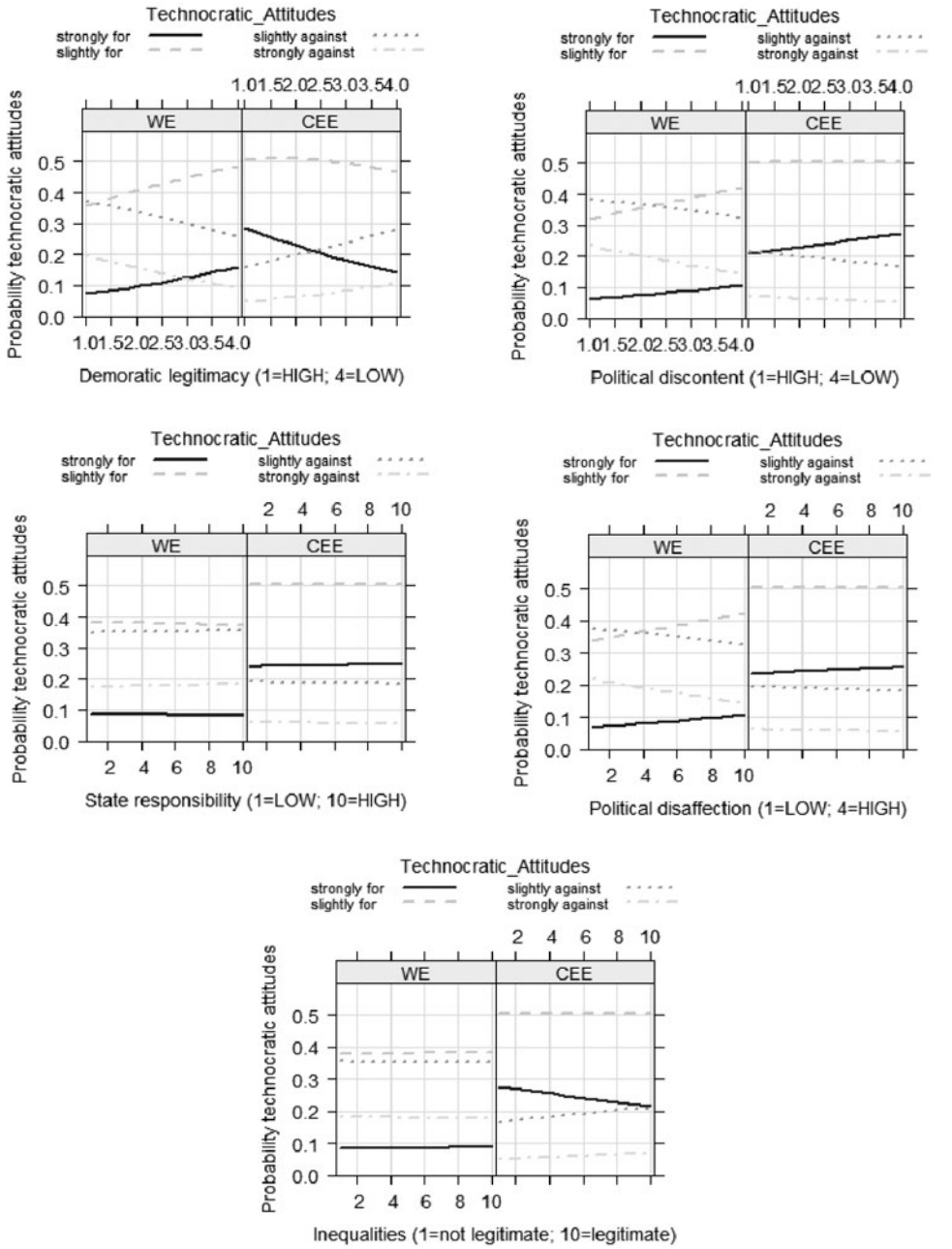
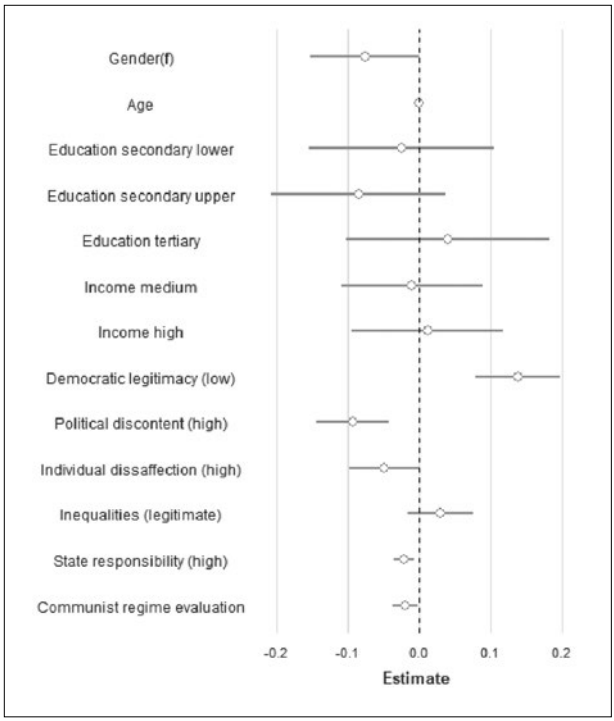


Figure 5: Multilevel ordinal regression. Predictors of technocratic attitudes. CEE countries. EVS data 1999



Discussion and Conclusions

The aim of this article was to contribute to the debate on the sources of the high popularity of technocracy and expert governance in post-communist CEE countries. CEE countries are characterized by long-standing support for this type of governance, and there is also a strong dissimilarity in this respect when compared to WE countries, which have been significantly less technocratic (see Figure 1). Therefore, it makes sense to ask what the sources of these attitudes in CEE countries are and how they differ compared to WE countries.

The main finding is that the source of support for technocratic governance in CEE is not dissatisfaction with democracy as a principle of governance. On the contrary, the more people support democracy as a principle of governance, the more they support technocratic expert-driven governance. Thus, people in CEE countries believe that technocratic and expert governance is fundamentally compatible with democracy. At the same time, support for technocratic governance is associated with dissatisfaction with how democratic institutions function in reality. Thus, it can be argued quite safely that in the CEE region expert governance is perceived as a way to improve democratic governance—not as a non-democratic alternative but as an antidote to failing democratic institutions. One can only

speculate on specific ideas of what this combination looks like. Very likely it takes the form of experts in otherwise political governments (Semenova 2020), technocratic interim governments (Buštíková and Guasti 2019), and advisory commissions, etc. This is consistent with findings that describe technocracy as not only intertwined with democratic party politics (e.g., Havlik 2019; Drápalová and Weigrich 2020) but also with policy (Durnová 2021). It has been argued that technocracy is seen in CEE in this context of governance and policymaking as a modernizing element, as a way of improving governance (Durnová 2021: 90).

Finally, the analysis presented in this paper has its limitations. The dependent variable contains one item and tests technocracy only very generally. However, more detailed measures of technocracy are not generally available for this comparative analysis design. It would also be interesting to see how the sources of technocratic attitudes have changed due to Covid-19. Unfortunately, however, EVS data does not capture this since the most recent wave is only from 2017. Finally, a further limitation is the absence of certain survey items—for example, those measuring communist nostalgia—in the more recent waves of EVS.

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Author

*Tomáš Dvořák***,** Ph.D. is a researcher at the Institute of Sociological Studies, Faculty of Social Sciences, Charles University. His work focuses on quantitative analysis in social and political research from a comparative European perspective. He is particularly interested in public opinion, electoral behaviour, and political representation.
Contact: tomas.dvorak@fsv.cuni.cz

Expertise and Conflicts in State Business Management During the Era of "Normalisation" in Czechoslovakia: Pluralism or Corporatism?[1]

Martin Štefek

ABSTRACT The socialist industrial managers were a specific elite group within Czechoslovak society. During the era of normalisation, their position was so solid that they could assertively manifest particular interests. At the same time, they were confronted with the demands of various political circumstances. First of all, they were bound by the production plan, which was set by the ministries for individual production sectors. At the same time, the functioning of enterprises was connected to the system of state administration. Most notably, the factories were under the steady control of the Communist Party of Czechoslovakia. This article ponders the uneasy relations of directors with multiple centres of power: the ministries, societal organizations, and both local and central organs of the Communist Party. The focus on "interests", "groups", and "conflict" reintroduces classic debate between proponents of pluralism and corporatism – both addressing the mode of interest representation. The core of the text, based on research on the realities of one particular factory, is a discussion on the conflict between ideological and technocratic/expert demands which directors were supposed to deal with.

KEYWORDS corporatism, pluralism, Soviet-type regime, normalisation, Czechoslovakia, conflict, expertise

Introduction

The question of what role expertise and experts should have in the political realm has been a constant topic in the field of political theory. In political practice, this issue confronts agents both in democratic states and in dictatorships. Soviet-type regimes were no exceptions. In post-WWII Czechoslovakia, the urgency of this problem appeared most clearly during 1968, when a technocratic vision of a more rational management of society appeared against a radically democratic concept of self-government (Štefek 2021). The suppression of the Prague Spring after 1969 meant the eradication of mutually conflicting discourses and representatives of various intellectual tendencies proposing different political and economic reforms.

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While the radical-democratic vision of self-government was firmly rejected and discredited (Fišera 1978), the scientific-technical revolution concept (STR) transferred easily to the post-1968 era. The STR was a vaguely defined "concept of the close relationship among scientific progress, technological development, and social change" (Sommer 2017: 100). Its most influential Czechoslovak proponent even pondered an idea that scientific and technical progress goes hand in hand with the emergence of communism (Richta 1969: 10). Elements of the theory could be used, because of its *political* sterility, for the normalisation discourse and official Party documents and programmes after 1970. Although the STR was a kind of safe intellectual shelter, there were some limits when it transferred to the sphere of political practice. In this article I intend to analyse the conflict of technocratic and Party-ideological influences taking place inside the socialist enterprise between the management and various political and societal groups. I argue that the incorporation of the STR discourse certainly did not eradicate conflict between ideologues and technocracy. On the contrary, it was difficult for "technicians" (whether individuals or expert groups) to argue with the Party dogmatists who spoke the language of science and technology. To analytically capture this conflict, I decided to study the perspective of key agents of the decision-making process – the industrial managers. Socialist enterprise was in fact a key political unit of the Soviet-type regime. Back then, almost all political and social activities were organized at the workplace. Party bodies in some huge or strategic factories possessed political powers comparable to district (*okres*) Party committees. Regardless of the size or character of the production of the factories, managers were political agents that can be clearly described as both objects and subjects of the decision-making process. The middle-level analysis – still poorly represented in the research – is not merely a look at the regional history. On the contrary, the perspective of production spaces may be valuable for studying the decision-making process as a whole, because socialist managers could have been bound up with institutions at all levels (central, regional, local, state and party) and they were supposed to play many formal and notably informal roles in a very complicated political structure. Furthermore, different expectations were placed on directors by different situations; industrial managers were supposed to change roles accordingly.

Being an industrial manager during the socialist era in the Eastern bloc was a very dynamic profession. The logic of directors' positions changed over time. While the 1940s and 1950s "red directors" were appointed solely on a political key to transform and maintain power of the Party in the factories, the incoming generation of managers was supposed to conform not only to power-ideological, but also some vocational criteria connected with the transition (or attempt to transition) from extensive to intensive development of industry.[2] Since the 1960s, the cadre policy of the Communist party took into consideration education and erudition of those who were appointed (Štefek 2019: 36). However, this shift of the criteria was closely connected with the fascination of science and possible revolutionary consequences of the STR for the socialist countries. Thus,

[2] Czechoslovak development imperfectly copies the Soviet model. As John P. Hardt and Theodore Frankel remarked in 1971, "The new manager required is more of a demand-oriented businessman and less of a supply-oriented production engineer" (1971: 171).

in spite of modest "rationalization" of Czechoslovakia's economy, directors managed "their" enterprises in the framework of rationality which was different from western capitalist models. As Vítězslav Sommer stated, "the task of the manager was either securing economic and organizational effectivity comparable with the performances of a capitalist firm or carrying out the socio-political strategies of the regime" (Sommer 2019: 111). What does it imply? The socialist managers were confronted with conflicting and often contradictory demands arising from multiple political instances, agencies, and authorities. At the same time, directors and vice-directors were, to various degrees, participants in Party politics due to overlapping roles. (A professional Party *apparatchik* could not simultaneously be a member of the plant management, while the director could be – and very often was – a member of the district Party committee.) Moreover, managers not only faced the pressures of different interests, but they also occasionally acted as bearers of specific interests. In spite of the limitations of their power, socialist managers had a unique position among the elite. Their success depended on how well they could deal with the overlapping roles. (At the same time, the success was measured differently by different agents.) Thus, for the middle-level analysis, it is very useful to observe polity and the decision-making process through the lens of directors. Thanks to their perspective one can learn a lot about both the elite positions and demands of rank and file.

First of all, directors were, in their everyday operation, bound by the production plan, which was set by the government for individual production sectors. At the same time, the functioning of enterprises was linked to the system of state administration: National committees (*Národní výbory* – units of the state administration) ruled and coordinated employment, public transportation, and protection of the environment – all agendas connected with the life of the factories. Most importantly, enterprises were under the steady control of the Communist Party of Czechoslovakia. To varying degrees, managements were directly accountable to the central, regional (*kraj*), and district (*okres*) Party organs. The factory itself was a kind of institutional system in which the conflicting interests of many actors were manifested. In the first place, the factory Party committee (usually called the All-Factory Committee) exercised the so-called "right of supervision". The Revolutionary Trade Union Movement, the Socialist Youth Union, and other social organisations of the National Front were also influential actors in representing the interests of its members, even though those agents were also under the supervision of the Party.

The factory as a focal point of social science research is not a new topic; empirical work based on archival research is still lacking though. Since the 1950s, the reflection of industrialization and its consequences has been a crucial research area in the field of Sovietology and the social sciences in general. As early as 1954 Barrington Moore Jr. anticipated the "possibility that those who now [after Stalin's death] make national economic policy might become identified with, or even dependent upon, specific group interests or in effect bureaucratic empires within the dictatorship" (Moore 1954: 36). He also predicted prospective future dominance of the "technical-rational and formal legal features" in the Soviet system of government (Moore 1954: 223). A similar thesis soon became prevalent among western scholars. Zbigniew Brzezinski, to cite one of the most respected students of the USSR, linked industrialism with the decline of totalitarianism:

"Totalitarianism, in the extreme form of this argument, is thus to disappear imperceptibly and unintentionally. As stability, predictability and overall rationality set in, fear, terror, and arbitrariness will fade. […] This, together with the growing stability of various privilege groups, will in turn lead to a form of pluralism, suggestive of the existing democratic systems" (Brzezinski 1956: 758). A few years later Brzezinski and Huntington in their monumental comparative study of the USA and the USSR linked industrialization with pluralization (Brzezinski and Huntington 1978 [1964]: 11). Similarly, Frederic Fleron argued that "totalitarianism is also difficult to achieve in an industrialized society because there is a much greater amount of technical information that the monocratic political elite must extract from the specialized elites of society" (Fleron 1969: 237). The role of directors, the representatives of these "specialized elites of society", in the key aspect of communist rule – the planning process, was clearly described by Alfred Meyer: "Planning in the USSR is more than mere commands issued at regular intervals by the central government. It is a continuous activity involving all levels of the economic administration, from the All-Union Council of Ministers down to every individual enterprise, farm, and workshop" (Meyer 1965: 395). Reflecting changes of the empirical reality of the USSR and its satellites in the post-Stalinist era, the above cited authors confirmed the central argument of the modernization theory about the connection between industrialism and pluralism (Apter 1965). Thus, *interest* became a key research area in the post-stalinist era; pluralism emerged as a standard concept in the field of the research.

I argue in this paper that the socialist industrial manager was most able to perceive a plurality of interests because he/she (but they were mostly men) was in contact with conflicting interests with which he had to coexist. In the subsequent text, I firstly discuss the key theoretical dispute between pluralism and corporatism – two competing theoretical frameworks focusing on representation of conflicting interests. Subsequently, I describe power relations in which directors had to work in the everyday life of "their" factories.

Between Pluralism and Corporatism

It took a long time before common social science concepts and theories became a standard component of research on Soviet politics. During the 1950s and 1960s, the term pluralism "was used pervasively in almost all literature dealing with groups in American political life", argued Suzan Gross Solomon, (1983: 14) and added: "At its height, pluralism was even treated as a theory of politics" (Solomon 1983: 14) Thanks to H. Gordon Skilling, the prevalent theoretical perspective became a standard tool for the Soviet-type regimes study. With this theoretical transfer, Sovietology fully accommodated social science research standards; the field freed itself from esoteric theory (theories) of totalitarianism. Many of them "place such heavy emphasis", as Azrael (1966: 177) remarked, "on political monolithism that they tend to deflect attention away from such aspects of Soviet politics as interest articulation and aggregation, alliance formation, bureaucratic bargaining, and so on". Skilling's adaptation of the group theory supposed that the USSR after 1953 "has been passing through a period of transition, characterized among other things by the increased activity of political interest groups and the presence of group conflict" (Skilling 1971: 19). However, this proposition

was supported by many East European official scholars (Skilling 1966). From the mid-1960s, the development of Czechoslovak polity and society provided rich empirical material for testing Skilling's theses. However, the resonating interpretation of the 1960s liberalization was based on the study of group conflict and pluralization (Brown 1966). In this theoretical perspective, the industrial managers were treated as representatives of a group interests clashing with other groupings (Hardt and Frankel 1971: 172). However, the group approach only gained ground when the dynamics of the Soviet regime and its satellites became evident during the Khrushchev era.

In a classic Jowitt's treatise, the author in his effort to capture the dynamics of Soviet-type regimes identifies "three elite-designated core tasks and stages of development. The first is transformation of the old society; the second is consolidation of the revolutionary regime; the third and current task is inclusion: attempts by the party elite to expand the internal boundaries of the regime's political, productive, and decision-making systems, to integrate itself with the non-official (i.e., non-*apparatchik*) sectors of society rather than insulate itself from them (Jowitt 1975: 69). Institutional integration as an expression of a distinctive stage of development challenged, from the 1970s, the highly resonating pluralist group approach. Retaining *interest* as a core category, the Sovietologists were suddenly confronted with a new theory of corporatism describing a system of interest representation, known from various ideological and regime settings (clerical, fascist, democratic and communist). In the field of political science, it was defined by Phillippe Schmitter as "a system of interest representation in which the constituent units are organized into a limited number of singular, compulsory, noncompetitive, hierarchically ordered and functionally differentiated categories, recognized or licensed (if not created) by the state and granted a deliberate representational monopoly within their respective categories in exchange for observing certain controls on their selection of leaders and articulation of demands and supports" (Schmitter 1974: 93–94). Corporatism was – both in theory and practice – an apparent counterpart of pluralism, although its focus shared the same area of interest (i.e., interest representation) as well as a rejection of the totalitarian thesis on monolithism. Applied first to western democracies, it soon became a topic for non-democracy experts. It did not take long for scholars to associate the rise of corporatism in the USSR with the transition from the Khrushchev to the Brezhnev era. While the former was characterized by conflict and radical change, the latter was distinguished by the reconciliation of (internal) conflict and stability. Valerie Bunce described Brezhnev's "developed socialism" as "a corporatist vision of a consensual society, in which conflict would be managed by an activist state through a series of deals struck between the state and functionally-based interests" (Bunce 1983: 134).

Although the pluralism/corporatism debate peaked half a century ago, it has not been replaced or surpassed by more recent theories. On the contrary, both approaches have taken root in broader conceptual frameworks used in the general study of polities and societies. Therefore, this debate should not be seen as obsolete. Thus, describing the onset of so-called normalisation in Czechoslovakia as an establishment of quasi-corporatism may be uncontroversial. While the eradication of the Prague Spring was marked by destroying independent groupings and a huge purge, the creation of the new regime was characterized by an effort to birth a broad compromise. (In this sense, I would propose using

the term "compromise" rather than "consensus" because the later term implies participation of free agents.)[3] The sphere of industry came, in the initial phase of normalisation, to be a key priority for reconstruction. That is to say, democratization of factories in 1968–1969 (the establishment of workers' councils, the election of management) belonged to the most visible manifestation of the disruption of the leading role of the Party. Thus, after the purge at the top institutions, , the middle and lower levels came next.

At the level of factories, the directors (survivors of purges of 1970 or newly appointed cadres) found themselves in a new situation: They did not have to face pressure from workers' councils (abolished in 1969/1970) and the branches of the Trade Union, which emancipated themselves from the Party during the Prague Spring and became subject to the communist elites again after 1969.On the other hand, managers were experiencing reestablished supervision of the Party structure which was recovering from the 1968 disintegration. Generally speaking, with the end of the 1960s economic reforms, the Czechoslovak economic system slowly shifted, using the Monitas' (1970: 122–123) typology, from the decentralized-administered to the centralized-administered type. While the former was characterized by lower reliance on hierarchically transmitted commands, the bottom-up planning (or at least a tendency to do so), and considerable managerial latitude, the latter was defined by a higher reliance on hierarchically transmitted commands, "top-down" planning (admitting, however, that the planning process was never one-way), and lower managerial latitude. The degree of managerial latitude was closely connected with the looseness of the recruitment. Using the Fleron's corresponding scheme, the transition from the 1960s to the 1970s in Czechoslovakia could be also described as a shift from a cooptation system to an adaptive-monocratic system. One differs from the other in a way cadres are recruited – the former type is characterized by the opportunity to recruit non-partisans, while the latter relies predominantly on party cadres (Fleron 1969). The restoration of the Party leading role after 1970 at all levels was most obvious in the cadre policy. For the directors it was not possible to appoint, for example, their nonpartisan candidates to the management position any more. From 1970 onwards all cadre proposals were supposed to be confirmed, depending on the importance of the position, by the Party committee at the factory, regional or central level. Thus, many educated non-partisans suspected of disloyalty had to work under the "cadre ceiling", i.e. in positions that did not meet their erudition. After 1970, there was another aspect of "normalisation" in enterprises. All-Factory Party Committees – organizational units bound up with regional Party Committees – were supposed to restore their "right of supervision". It was a power defined by the Party status residing in an idea according to which the local Party boss was supposed to check the activities of the management (Šolc, Folprecht 1984: 47). After all, the struggle with the local party boss – the chairman of the All-Factory Committee – was a crucial relation. Together with the Trade Union chairman, they formed, as Jerry Hough reminds, "a three-man directorate – the triangle […], a term from the 1920s still used today" (Hough 1969: 95). As I shall demonstrate below, there were many possible modes for their mutual cooperation, even though the top leadership of the Party did

[3] I thank Radek Buben for suggesting this terminological distinction.

not expect arbitrary patterns of cooperation/coexistence. Actual modus operandi depended largely on the personal traits of officials as well as on the role of the higher Party organs. It has been stated that the director retaining a political role at the district Party Committee could eventually win the favour of the Party apparatus resulting in the overshadowing of the Party boss in the factory. On the second end of the scale, a politically weak director could get the short end of the stick when struggling with a strong Party chairman acting as an agent of the District Party Committee. The role of the third side of the triangle, the Trade Union representative, varied similarly. Moreover, because the membership in the Trade Union was regarded as compulsory, it was impossible to free oneself from this role.

Viewed from the theoretical dispute between pluralism and corporatism, it was evident that after 1969/1970 the Communist Party of Czechoslovakia succeeded in eradicating the vast majority of independent groupings. Still, the Husák leadership was supposed to originate a new system of interest intermediation. (Or at least something that appears to perform such a role in a very differentiated society.) At the level of factories, the main task was to reject both the spontaneousness of workers' activities and the above-mentioned arbitrariness of relations between managers and the Party officials. Therefore, the top leadership of the Party and the state tried to institutionalize the coexistence of key agents of interest intermediation. The overlapping of roles was one of the traits of a new (quasi-corporatist) system. The existing fusion of the Party and state clearly visible at the highest level (the Presidium of the Central Committee was an example of such fusion) worked not only at the regional level (*okresy*, *kraje*), but also at the level of factories. Members of the enterprise management usually were not members of the All-Factory Party Committee, but there were platforms gathering both sides (see next chapter). Furthermore, the top leaders of the regime were well aware of the necessity of the workers' (seeming) incorporation. In 1972, the Secretariat of the Central Committee approved rules for production meetings (*výrobní porada*) and so called "permanent production meetings" (*stálá výrobní porada*). The former was a regular session of employees from a particular workshop or section, led by the foreman, the Trade Union representative and the Party cell leader. According to the Party statement, in the production meeting "there is a practical merging of workers' views with those of managers" (*NA*, f. KSČ-ÚV-02/4, sv. 63, arch. j. 99, b. 16, Příloha III, p. 4.) The latter (i. e. permanent) was a formal body consisting of members of the factory managers, party bosses and representatives of Unions.

> Permanent production meetings are the opposite of so-called workers' councils, to which the right-wingers have entrusted a destructive task: They were supposed to eliminate the Party's control over the national economy, to cancel socialist planning of the economic development to eliminate the trade unionist movement's influence over economic development and its role – the provider of worker's participation on the management of economy. (NA, f. KSČ-ÚV-02/4, sv. 63, arch. j. 99, b. 16, Příloha IV, p. 2)

This type of institutionalization forced the factory management to make compromises on various levels. Being involved, directly and indirectly, in many political platforms, it was difficult for the director to act as an independent agent. For that matter, the official Czechoslovak "science of management" argued that beside the director, the representatives

of the Communist Party and the Trade Union were all to take part in the management of the factory; all instances are supposed to be united in the decision-making process (Stříteský 1979: 29–30). In technical issues, the director could either make a compromise, or listen to the independent expert advice bypassing official institutional platforms. Doing that, he/she dangerously escaped the arena for institutionalized negotiation. Wise and brave directors had to act as such because the compromise with the Party was very often inconsistent with rational development and efficiency of the production. As time went on, the quasi-corporatist arrangement grew stronger in the pre-perestroika Czechoslovakia. Based on the Soviet experiment, the Czechoslovak industry introduced the "brigade system" (not to be confused with the Socialist work brigades which will be mentioned below). The model of brigades from 1979 responded to the economic stagnation of the Soviet economy. "The essence of these experiments is that workers within a factory or shop are organized into semi-autonomous brigades, an organizational unit created at the level of the immediate work group. Workers who had been under a single foreman might be divided into several brigades, each with a brigade leader", states Darrell Slider (1987: 389). The most important aim of this model, soon established in Czechoslovakia as well, was to establish a *khozraschet*, the principle of self-financing (Slider 1987: 391) which was one of the tools of the perestroika reform after 1985. Besides, the creation of a novel intra-institutional structure complicated power relations inside the factory, because leaders of the brigade were supposed to be incorporated into the institutionalized *compromise.* Involving ordinary employees either completed quasi-corporatist fusion or limited directors to coopt expertise as a principal of decision-making. In the following section, I will attempt to illustrate that the above theoretical perspective is useful if we look at the everyday reality of the socialist factory. Corporatism in this case can be also used as a criterion for the selection of empirical material.

1983: One Year in One Factory

The micro-historical analysis can barely provide empirical material for generalization. Yet, as Kotkin's ground-breaking book shows, it can offer a thought-provoking perspective from a lower institutional level and it can surely provide data for hypothesis generation. Intensive research of the large archival collection of the ceramic plant in Rakovník provided deep insight into changing patterns of behaviour of local elites.[4]

Rakovnické keramické závody (RKZ) was established in 1883 in Rakovník, central Bohemia. From the beginning of the 20th century, it was known as a top-class producer of tiles and its brand RAKO. After the nationalization in 1946 and notably after the 1948 communist coup, the factory became part of the political system. As Stephen Kotkin stated, "Soviet production space was a focal point for the intersection of a variety of agencies" (Kotkin 1997: 197). The RKZ consisted of three factories (each subsidiary had its own

[4] This chapter is based on research I conducted to write the book *Perestrojka v Šamotce*. Some of the findings overlap with the manuscript of the book. Štefek, Martin. 2024. *Perestrojka v Šamotce. Proměny vedoucí úlohy KSČ z perspektivy jednoho podniku.* Praha, ARGO/ÚSD AV ČR.

director which was subordinated to the director of enterprise) no more than eight kilometres apart, located around the district city Rakovník. In the 1980s, the RKZ was the biggest employer in the district (*okres*), giving jobs to more than 1800 people. Considering its size and the character of its production, it can be described as a medium to high importance company. It was gathered, together with other ten ceramic plants in Czechoslovakia, into the production-economic unit Czechoslovak Ceramic Plants (VHJ ČKZ). The VHJs were an intermediate level of the planned economy administration hierarchically located between the ministry and the individual enterprise. It comprised the administrative apparatus and the directorate. Since the VHJ was kind of a "fictive" company without workers, the steady Party supervision absented. On the contrary, the premises of the RKZ factory (in this case the plant nr. 1 in the Rakovník district of Šamotka) contained not only large production halls, but also the headquarters and offices of the chairman of the Party All-Factory Committee, the Trade Union boss, the Socialist Youth Union officials and some other societal organizations. In the subsequent paragraphs, I will describe the life of the factory in 1983. I chose the timeframe of one year to show how much of the agenda was set in a relatively short time. I approach the description of the year 1983 specifically because that is when the transformation of power relations inside the enterprise took place.

During the normalisation era, experts were considerably limited in giving advice to managers who were supposed to effectively develop the production of the enterprise. Because alternatives to the planned command economy were taboo, development had to relate predominantly to technological innovation. Directors could rely either on volunteer innovators or to focus on importing modern technology from the West. Particularly in the RKZ, it was not easy to enforce the import of technologies. There was one important hidden player that complicated the director's independent action. In the RKZ, there were, among employers, informers of the State Security (StB), the secret political police. As voluminous archival file documents, higher political authorities could be informed about a wide range of a director's actions, including his foreign contacts and business trips. Thus, the presence of the StB agents complicated the director's efforts to hide some strategic decisions from the Party which intended to intervene not only in personal issues, but also into technical problems. At the beginning of 1980s, the enterprise still produced a limited range of goods due to the outdated equipment, notably the obsolete kilns. The factory Party structure constantly vetoed western technologies that were prerequisites for modernization. However, during the building of the plant nr. 3 of the RKZ (opened in 1980), the StB secretly investigated the director's correspondence and contacts with foreign firms (ABS, f. OB/MV, sig. OBŽ – 25419 MV, sv. 3). Thus, the vehement director's (successful) press for the advanced technologies from the capitalist West was an occupational hazard.

Directors had to resolve within themselves a conflict between the expert-based plan of rational development of the enterprise on the one hand and a "corporatist compromise" that may have been inconsistent with expert opinions. (The Party's clinging to the eastern technologies may be a clear example of this conflict.) However, it was not a question of either/or. First, directors were limited in the possibility to form a board of vice-directors, which means that the groups of managers may not have been uniform. Even though this was not the case in the RKZ of the studied period, the particular members of the enterprise

management usually occupied some Party posts. Overlapping roles and the accumulation of posts was, presumably, a double-edged weapon. Thus, the director had to "check his six o'clock position" all the time and, simultaneously, it was a necessary and safe tactic for him to accept Party functions as well. (Members of the management usually were members of Party committees at the district level, lecturers of Party schools or members of Party commissions.)

The organizational rules of the RKZ enterprise defined relation between management and the Party as follows:

The principle of unity of the political leadership and the management is to be forced in the practice of the enterprise. Dealing with the economic questions, the leading role of the Party must be respected and all tasks are realized in accordance with the Party's economic-political programme. (SOkA Rakovník, f. RKZ, Úsek ředitele, Organizační řád, p. 5)

Another difficulty arises with the following unwritten rule: The director was supposed to be responsive (and responsible) to all levels of the Party – from the resolutions of the Congress, the Central committee, through the individual demands of regional and district secretaries (the RKZ director was appointed after approval of the regional Party Committee), to the most frequent struggles with the chairman of the All-Factory Committee and the Party cells in general. During the 1980s, there were seven Party cells in the factory; approximately 20 percent of employees were members of the party (SOkA Rakovník, f. RKZ Rakovník, k. 1982–3, Zpráva o hospodaření n. p. RKZ Rakovník k 1. 1. 1983). Thus, basic cells of the Party were the first source of demands: Management was supposed to answer questions posed by ordinary members (SOkA Rakovník, f. RKZ Rakovník, k. 1. V5 – 1982, 1983, útvar VN). More importantly, the director or vice-directors had to take part in – as guests – regular meetings of the All-Factory Committee. Its chairman was a professional *apparatchik* employed and paid by the district (*okres*) Party Committee whose officials were expecting an assertive and authoritative exercising of the "right of supervision". The Chairman resided in its office directly in the factory, while other members of the All-Factory Committee were ordinary employees. Thus, a chairman's everyday activity consisted in constantly commanding the director and inspecting his activities. Thus, the All Factory Committee represented by the chairman had an ambition to be a kind of "shadow" management of the enterprise. Accomplishment of this task depended on the personal traits of both the director and the Party chairman. In the RZK, the director Václav Veselý was capable of overshadowing the weak *apparatchik* before 1982.[5] In 1982, the new, younger and more assertive ideologue was appointed as party apparatus nominee. The All-Factory Party Conference in 1983 formally approved the nominee. In the same year, the director Veselý left the RKZ after 18 years (he became the director of the VHJ Cement and Lime plants). As a consequence, a totally new power relation between the enterprise management and the Party was established; the current vice-director was appointed interim director. Even though the Central Committee did not presuppose haphazard relations between the state and the Party branches, scholars may observe many models of coexistence – from

[5] Interview with former vice-director (anonymized), 2022.

the rather rare dominance of the cunning director (as was the case of the RKZ before 1983), through very common equilibria based on either consensus or even a struggle between the director and the Party, to the rough dominance of the Party chief over political unprotected technocratic management. Either way, the ability to manoeuvre and to pay lip-service to the All-Factory Committee remained among the most important skills of the director. Every single employee of the plant could know that the Party chief could have the ambition (and power) to intervene in virtually any issue of the administration. Clearly, the Party had the right – following from the system of nomenklatura – to approve almost all appointments to the factory management at all levels. When the director, for example, wished to hire an educated technician to the middle-level management (not to speak of the top management), he needed the approval of the Party (SOkA Rakovník, f. RKZ Rakovník, TN E – A5 – 1986). Here, we can see the main obstacle for expertise and rational management. Even though the education was, during the 1970s and 1980s a standard requirement for incoming leading cadres, the director was not a sovereign in recruiting the best people. In the RKZ, the director made informal relations with technicians who served in positions under the "cadre ceiling".

In 1983, twenty-four meetings of the All-factory Committee took place. The director or someone from the highest management, usually a vice-director, was always present as guest. As the former acting director admits, "I used to go to the meeting to confess".6 The minutes of the meetings (SOkA Rakovník, fond RKZ, k. 9. 1982–3) retain data on the way the "right of supervision" was exercised. First, the Committee acted as a kind of "transmission belt" for the higher authorities, notably the district level. Second, the body prepared all propagandist events (jubilees, holidays). Third, the Party in the factory directly influenced the technical decisions concerning technology of the production and modernization. Fourth, the Committee supervised the plan fulfilment and tried to enter the planning process using the so-called "workers' initiative" (see below). And fifth, the Party supervised all organizational changes and personal affairs from the top management to the level of foremen. The director was supposed to respect the Party resolution and to fulfil the tasks imposed.

The production planning was a process in which directors played a considerable role. The seventh five-year plan for the period of 1981–1986 was, in fact, a law approved by the Federal Assembly.7 It generally stated, for the construction industry, "to secure sustained labour productivity growth". Particular (and quantifiable specific) five-year plans for the whole industrial sector, the VHJs and particular enterprises were derived from the law – the five-year plan. Every VHJ got general requirements from the ministry. This included not only production demands, but also power supplies, quantification of workforces and wages (SOA Praha, f. ČKZ, k. 341). Thus, it was possible to make a strategic decision on development especially at the beginning of the planning process. Cunning directors were supposed to require more inputs (investments, energy) and promise less outputs (produced goods). The system did not motivate directors to overshoot planned production of goods, because the exceeding determined the plan for the subsequent year (Vilímek 2019: 118–119). Moreover, the management could not freely handle extra profit. The five-year plan

6 Interview with former vice-director (anonymized), 2022.

7 https://www.zakonyprolidi.cz/cs/1981-122

for the factory was never a final document. In the general framework of the five-year plan, the management was supposed to prepare "implementation one-year plans". Based on the result of the 1983 expected production and the assessment of technical conditions, the management of the RKZ approved the 1984 one-year implementation plan defining the amount of produced goods, number of employees, average wage, expected profit, and the energy savings (SOkA Rakovník, fond RKZ, k. 9. 1982–3). These macro-indicators could not be easily influenced by the Party. Yet, the All-Factory Committee was able to enter the planning process through (organized) "worker's initiatives". Stachanovite-like mobilization was, as Monitas (1970: 122–123) showed, a very typical organizational tool in the centralized-administered economic systems. In 1983, more than 89 percent of the RKZ employees were engaged in the individual or collective "socialist working commitments" made in honour of the centenary (SOkA Rakovník, EN, r. 1985, S3). The most common form of the initiative in Czechoslovakia (and other communist states) was the Socialist Work Brigades (BSP). The collectives of employees were urged to "spontaneously" establish the brigade and to adopt the "socialist commitment" – a task leading to an economic effect. The BSPs – usually small groups of people from one workspace – could potentially have several roles. They could be either formal or very active; either misused by the Party for propagandist reasons or useful for the production process; they could either constitute a real community with some participative ethos or remain as a formal group misused by the Party propaganda. BSPs could have either a destructive role in the planning process (the commitments could be inconsistent with a limited amount of raw materials) or could be helpful if a spontaneous group of technicians made a commitment to innovate in regards to machinery. In the second case, the director was supposed to be getting the brigade on his own side, or to establish a Complex Rationalization Brigade (KRB) – a gathering of technicians with a specific technological task.

Both BSPs and KRBs were part of the above-mentioned permanent production meeting which assembled representatives of distinctive interests in the factory (although it was not officially said so): This platform was institutionalized in the RKZ in 1983 after 12 months of experimentation at the behest of the Czech construction ministry. The new body consisted of 27 members (16 of them were workers), it gathered seven members of the highest management, five representatives of BSPs and KRBs, two innovators, seven trade unionists, two delegates of the Socialist Youth Union and four members of the All-Factory Party Committee and basic Party cells. Meetings dealt predominantly with technical issues concerning development of production.

Resolutions of higher Party Committees could considerably back the All-Factory Committee's attempts to set technical issues into the agenda. In 1983, the 8th meeting of the Central Committee of the Communist Party approved "The report of the presidium of the Central Committee to the acceleration of the science and techniques on praxis." Miloš Jakeš, the senior member of the Presidium, admitted the decline of the economy, and said:

> The analysis and gathered experiences show that the key problem rests in insufficient and slow applying outcomes of the scientific-technical development in the practice. Innovations of goods and the production programmes, the whole manufacturing process and technologies in our enterprises and the VHJs lag behind the demands of our economic development. (NA, f. KSČ-ÚV-01, sv. 323, arch. j. 185, b. 22, p. 6)

As Jakeš clearly stated, this resolution was supposed to be binding "for the whole Party, for communists in the state, production, and societal institutions (NA, f. KSČ-ÚV-01, sv. 323, arch. j. 185, b. 22, p. 7). This was not an empty phrase. In the Communist Czechoslovakia, norms were both legal (laws, government regulations) and declaratory. That is to say, the resolution of the Central Committee, thought not law, was a binding norm. As a consequence, the local Party committee urged and supervised the management to prepare and approve a document – an implementation of the 8th plenary session in the conditions of the RKZ. The director "contracted" to fulfilling both general and concrete technical and technological tasks (SOkA Rakovník, f. RKZ, k. 1. V5 – 1982, 1983 útvar VN). As a consequence, the director had to process two parallel technological plans.

In November 1983, after six months of interlude, the All-Factory Committee were pushing to get Zdeněk Hanzlík from the VHJ directorate as new director of the RKZ. (In fact, the local Party made the choice.) Meanwhile, the Party officials consolidated their power after the departure of the old director. The appointment of a technically skilful manager initiated a qualitatively new phase of the RKZ development. The new director had a serious task ahead: He was supposed to introduce the new brigade system. From December 1983, 62 workers experimented with this form of organization. (SOkA Rakovník, f. OV KSČ, k. 87, inv. č. 115, 28. 8. 1985) As Slider (1987: 395) remarked, in the USSR managers were rather reluctant to introduce the new system. Not surprisingly, it involved another agent into the quasi-corporatist institutionalized compromise; brigades were another agent in the decision-making process. (It did not matter whether it was independent of a party-controlled actor.) In the RKZ, the new director was not in a hurry to introduce the brigades; only 38 percent of workers were involved in the brigade system by 1985 (SOkA Rakovník, f. OV KSČ, k. 87, inv. č. 115, 28. 8. 1985). Even though Hanzlík was politically weak and unprotected, he set a new *modus operandi* with the assertive chairman of the All-factory committee. As an informer of the state security reported in late 1984 to the superior officer, "there are disputes between them because [the Party chairman] intervenes into the management and even into the technical questions of the production" (ABS, f. OB/MV, sig. OBŽ – 25419 MV, sv. 3, p. 119–120). Hanzlík not only struggled with the Party inside the factory, but also the district committee of the Communist Party. While his predecessor Veselý was able to overshadow the local Party structure, Hanzlík had to run the risk of bypassing the institutionalized structures. However, quasi-independent expert councils and committees gained importance after 1983 even though the involvement of non-partisans was under steady censure of the Party, as minutes of the district Party Committee clearly document (see SOkA Rakovník f. OV KSČ Rakovník, k. 26, inv. č. 73, p. 48).

During one year, profound changes occurred in one factory. The example of the RKZ shows how accidental the power relations could have been during the era of normalisation, though they were institutionalized. Taking into consideration the above findings, it is apt to say that the production was not "the only game" in the factory. The director had to first build a solid position to cope with the struggles in which he/she was drawn by other actors. Then he/she could concentrate on running the enterprise. Understanding the rules of the game and accepting them was a precondition for his success in a managerial position.

Conclusions

Both concepts of pluralism and corporatism are, in my view, useful descriptive and explanatory tools for different situations. Speaking about the Brezhnev era generally and the normalisation in Czechoslovakia particularly, it is evident that institutional settings at the middle and lower level of the structure were supposed to appear as a compromise. Contrary to 1968 and the pre-January situations of autonomization of the agents (theory of pluralism is useful here), the 1970s and 1980s was a time marked by an ostensible convergence of interests characterized by the building of platforms to ensure compromise (rather than consensus). This seeming compromise covered workers' "initiative from below", the protection of the social interests, the expert/technocratic vision of rational management and the Party's claim to ideological leadership. Therefore, the concept of corporatism fits this era considering the *appearance* of compromise. It also explains the incremental character of the decision-making process. The period is marked not only by the complexity of politics and the wide range of agents involved, but also by the change of the political culture. As Bunce and Echols stated, the revolutionary "ideological activism" of Stalin and Khrushchev eras was replaced "by a concern for moderation" (Bunce and Echols 1978: 915).

Being a socialist industrial manager demanded a wide range of skills. A talent for subterfuge was the main skill of a successful manager who did not want to retain a mere incremental development defined by the five-year plan. The director combined the roles of an educated technocrat (whether economist or technician) and the Party member was supposed to pay lip service to the Party directives, to be part of the compromising setting with the predominance of the Party, and to know how to safely escape the institutionalized compromise. Directors were supposed to find allies not only among technicians in factories, but notably in the state bureaucracy structure. Both the level of the VHJ and ministries – even though ruled by communists – were eliminated from steady supervision of the Party. Even though there were so-called coordination meetings of the party officials at the level of VHJ twice a year, they do not appear as "corporatist". Thus, the state bureaucracy could have been, under specific circumstances, the main ally of industrial managers.

Does the text imply that the managers were mere schemers balancing between conflicting currents? Indeed, the socialist factory was not only a production sphere. Since the factories held different functions, the management necessarily could not concentrate solely on the production, they had to be politicians of a kind. Taking part in the institutionalized quasi-corporatist compromise took a lot of time and mental capacity. Some sides of the "compromise" – notably the Revolutionary Trade Union Movement and representatives of ordinary workers were under the steady supervision of the Party. In the end, the Communist Party of Czechoslovakia was a crucial adversary of directors (always members of the Party) whenever they attempted to escape institutionalized compromise.

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Author

Martin Štefek is an Assistant Professor at the Department of Political Science, Faculty of Arts, Charles University and a researcher at the Institute of Contemporary History, Czech Academy of Sciences. He focuses on comparative politics, totalitarian theory, and the history of Communism in Czechoslovakia. He has published three monographs: *Za fasádou jednoty: KSČ a SED po roce 1985* (2014), *Kádry rozhodují, ovšem: Předjaří, pražské jaro a počátky normalizace v proměnách systému nomenklatury ÚV KSČ* (2019), and *Perestrojka v Šamotce: Proměny vedoucí úlohy KSČ z perspektivy jednoho podniku* (2024).
Contact: stefek@usd.cas.cz

Industrial Management and the Crisis of Managerial Expertise in Economic Transformation: A Case Study of the Czech Footwear Industry[1]

Vítězslav Sommer

ABSTRACT This article examines how Czechoslovak managers coped with the collapse of the centrally planned economy and the rise of capitalism in the late 1980s and early 1990s. The aim of this text is to analyze how the rapid change in political and economic conditions transformed a specific expert culture that was distinctly technocratic in nature. As a case study the article uses the shoe company Svit Gottwaldov (after 1989 Svit Zlín). The objective of this article is to apply the conclusions of previous research on the managerial class and technocracy in late socialism and post-socialism to the analysis of events within a specific industrial sector. The analytical perspective proposed here serves to complement existing knowledge with research on experience grounded in a specific regional and industrial expert milieu. This article shows that the activities of managers in the era of economic transformation, their long-term plans and their momentary decisions were the result of a complex and ambivalent interaction of continuities and discontinuities in managerial practice and thinking.

KEYWORDS history of expertise, technocracy, economic transformation, management, footwear industry, state socialism, post-socialism

Using the example of a specific industrial firm, this article examines how Czechoslovak managers coped with the collapse of the centrally planned economy and the rise of capitalism in the late 1980s and early 1990s. For managers accustomed to operating not only in a different economic system but also in a different managerial culture, the return of capitalism to the former Eastern Bloc countries was a major challenge. The speed of change meant that they had to learn quickly the rules of a new economic and political system. This article examines how the rapid change in political and economic conditions transformed a specific expert culture that was distinctly technocratic in nature.

The article considers managers to be not only actors in charge of the organization of work in industrial enterprises, but also bearers of political power that was based on their

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expertise. Managers were part of the technocratic class that emerged in state socialism in the post-Stalinist period and was fully formed during the so-called consolidation after 1968. Their position in the power hierarchy of state socialism was determined by their key role in the economic sphere. Managers were tasked with implementing state economic plans and keeping the complex machinery of the centrally planned economy running. Consequently, they were the holders of political power, which was based not solely on ideological positions but also on knowledge and competence. The year 1989 and the subsequent rise of capitalism presented a significant challenge not only in relation to their expertise but also to their authority in the industrial environment. The article examines how managers coped with a systemic change that not only marked the advent of capitalism but also threatened a technocratic order based on a depoliticized public sphere and an authoritarian combination of party centralism and expert governance.

This article builds on a long tradition of research on technocracy in state socialism and post-socialism. This line of inquiry examines the political role of intellectuals and experts in the socialist dictatorship and the subsequent transformation period. The research on expertise and technocracy in state socialism has always been closely linked to the study of management in a centrally planned economy. In the context of the history of management studies in the Eastern Bloc and the study of management before 1989, historians and social scientists have typically sought to address the common question: What was the political role of economic and organizational efficiency in state socialism (Beissinger 1988; Sommer 2018)? Existing research suggests that technocratic socialism was the answer to a serious challenge facing centrally planned economies – reconciling socialist visions of equality, social justice and central planning with the everyday realities of the modern industrial economy (Hofman and Laird 1985; Sommer et al. 2019). Historians have also shown that the technocratic aspects of socialist governance influenced developments after 1989, creating a continuity between late socialism and post-socialist capitalism (Krátká 2023; Rameš 2021; Rameš and Kopeček 2019; Vilímek 2019).

From a theoretical perspective, the article is inspired by the "new class" theory, which sought to explain the power arrangements in state socialism and their influence on the later formation of the class structure of post-socialist societies (Szelényi and King 2004). The seminal work of Hungarian sociologists George Konrad and Ivan Szelényi, *The Intellectuals on the Road to Class Power* (written in 1973 and 1974), posited that a power coalition comprising party elites and the "new class" of educated professionals had gradually emerged in state socialist countries (Konrad and Szelényi 1979). These technocrats accumulated political power as the communist parties eliminated attempts at more radical reforms of state socialism after 1968. This pragmatic alliance bestowed certain political influence upon the technocrats, yet simultaneously demonstrated the limitations of their power. According to Konrad and Szelényi, the experts and technocrats were to gradually gain more power by allying with the critical intellectuals of dissent, thereby weakening or eliminating the power of the communist apparatus and establishing a "class rule of the intelligentsia" (Konrad and Szelényi: 234).

This analytical perspective has been further developed by the examination of class formation in post-socialism (Eyal, Szelényi, and Townsley 1998). This influential

interpretation posits that the distinctive feature of post-socialist capitalism was its emergence on the foundation of the pragmatic coalition described by Konrad and Szelényi in the early 1970s. The alliance of late socialist technocrats and dissidents constituted a novel ruling class that shaped the trajectory of the post-socialist transformation. In the Czechoslovak case, the outcome was not only the emergence of a novel form of class power but also the dissolution of Czechoslovakia, which posed an obstacle to the political aspirations of the newly constituted coalition of technocrats and dissidents (Eyal 2003). As managers were an essential element of the late socialist technocratic class, it can be presumed that they were among the primary beneficiaries of the post-socialist transformation. Consequently, following 1989, they accumulated not only cultural and economic capital but also, and perhaps most significantly, political capital.

Previous research analyzed the evolution of managerial and organizational culture in the Czech and Czechoslovak industry during the transformation period (Mlčoch 1992; Soulsby and Clark 1996; Soulsby and Clark 1996; Soulsby and Clark 1998; Soulsby 2001; Clark and Soulsby 2005; Vilímek 2012). This article links research on Czechoslovak industrial management in the 1980s and 1990s with an attempt to test the theoretical thesis described above about the triumph of experts (former socialist technocrats) after 1989. Rather than disproving the "new class" theory, the objective is to challenge its somewhat unambiguous interpretation through a case study examining a specific industrial enterprise and its top management during the transformation period. By utilizing evidence from specific regional and industrial context, the article seeks to introduce more ambivalence to the established and widely accepted interpretation that former socialist managers and technocrats, as well as experts in general, were ultimate winners in post-socialist capitalism.

As a case study I use the shoe company Svit Gottwaldov (after 1989 Svit Zlín). The first part of the article describes corporate culture in late socialism. It presents the educational, political, generational and gender profile of the managerial class. It also characterizes managerial expertise and shows what knowledge and skills the economic regime of central planning required of managers in this particular industrial enterprise. The second part examines the challenges posed to Czechoslovak managers by *perestroika*, which was a prelude to the far-reaching systemic changes after 1989. The impact of economic transformation on the managerial class is analyzed in the third part. The objective of this article is to apply the conclusions of previous research on the managerial class and technocracy in late socialism and post-socialism to the analysis of events within a specific industrial sector. The analytical perspective proposed here serves to complement existing knowledge with research on experience grounded in a specific regional and industrial expert milieu.[2]

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[2] The research presented in this article is based on the analysis of internal documents from the Svit archive. The second important source of information is the company magazine Tep, which provided detailed coverage of company events, published important data on production, products, or employment, andafter 1989 was also an important forum for discussions about Svit's future in the market economy. In addition to the aforementioned primary sources, the article draws upon the analysis of articles in the regional and national press that covered the company's activities.

Managers in Late Socialist Enterprises

Svit was the biggest footwear manufacturer in Czechoslovakia. It was the successor to Baťa company, founded in 1894, whose global expansion in the 1930s made it a symbol of Czechoslovak interwar capitalism (Doleshal 2021; Ševeček 2009). After nationalization in 1945, Baťa's Canadian branch took over most of the company's activities outside Czechoslovakia and the Eastern Bloc. The plants in Czechoslovakia were transformed into a state-owned company. From 1948 it was called Svit. At the end of the 1980s, its headquarters in Gottwaldov (after 1989 Zlín) managed a network of plants and smaller production units spread throughout the country. The company employed around 37,000 people and produced more than 60 million pairs of shoes a year (63,584,000 pairs in 1989).[3] Svit was a company whose importance extended beyond Czechoslovakia. It was one of the largest shoe manufacturers in the Eastern Bloc. The company was the main supplier of footwear to the domestic market, but around 60% of production was exported. Its largest export market was the Soviet Union. The annual "USSR contract" covered a significant part of Svit's production – in 1988 it was 22,620,000 pairs of shoes.[4] Svit was one of the twenty largest Czechoslovak companies.[5] It is thus a sufficiently representative case for the analysis of late socialist managerial culture. Svit's management included all levels of the corporate hierarchy – from the management of individual workshops to the head office of the entire group. In this article I will focus on the top management, as it played a central role in both *perestroika* and the economic transformation after 1989. Who were the managers who ran this company? What was their educational background? What was the age and gender structure of the management?

On the basis of the personnel records, it is possible to draw up a short collective biography of the company's management.[6] At the end of the 1980s, Svit was run by representatives of two generations of managers, who differed to a certain extent in their professional careers, educational backgrounds and political involvement. Managers born in the inter-war period still played an important role in Svit. They were veterans of the centrally planned economy. Many of them had worked in lower technical or blue-collar positions at Baťa before 1948. Their careers accelerated in the late 1940s and early 1950s as state socialism brought young communists into senior management positions. Some of them held high positions until 1989.

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3 Moravský zemský archiv v Brně – Státní okresní archiv Zlín (Moravian Land Archives in Brno – State District Archive Zlín (MZA – SOkA Zlín), fond (f.) Obuvnický průmysl – Svit, Ředitelna, inventární číslo (i. č. – inventory number) 847, karton (k. – box) 201, Kolektivní návrh na založení státního podniku Obuvnický průmysl – Svit, Gottwaldov, March 1988; Ibid., i. č. 855, k. 203, Splnění plánu za rok 1988, January 1989; Ibid., i. č. 857, k. 205, Koncepce rozvoje obuvnické výroby do roku 1995 a výhled do roku 2000, June 1989; Ibid., i. č. 837, k. 199, Charakteristika VHJ Svit (1987) a s. p. Obuvnický průmysl Svit (1989).

4 Ibid., i. č. 846, k. 201, Informace o výsledku kontraktace a cenových jednání SSSR 1989, October 1988.

5 Třicet největších, *Tep* 41/1991 (22. 10. 1991), p. 5.

6 MZA – SOkA Zlín, f. Obuvnický průmysl – Svit, Osobní oddělení, i. č. 263, k. 863, Nomenklatura GŘ ČOP 1983; Ibid., i. č. 264, k. 863, Nomenklatura VHJ Svit a GŘ ČOP, 1983–1989. These documents are the source of the personnel data used in this article.

They often had political merits from the 1950s and influential contacts in the Communist Party (CPC) apparatus. Surviving the post-1968 purge was also a condition for their tenure in top management. Pragmatism and political conformity were important prerequisites for their long careers, as was the ability to navigate the informal relationships between planning institutions, ministries, bureaucrats, other enterprises and their managers, and apparatchiks at regional and central levels.

Their deficit was under-education. It was not uncommon for a plant manager not to have a university degree or to have acquired the necessary academic qualifications only formally during the course of his career. They compensated for their lack of professional skills with extensive experience in central planning structures and political positions in the *nomenklatura*. Rather than being derived from theoretical or technical knowledge, this particular expertise was developed through years of practical experience. One of the peculiarities of Svit was that for a long time the lower technical positions in the company were held by older experts who had started their careers at Baťa before 1945. They were the bearers of continuity between two stages in the development of the Czechoslovak shoe industry. They had weak political capital because of their personal history before 1948, but they were indispensable to the company because of their expertise and therefore had considerable informal authority. Svit thus had a broad personnel base of shoe experts socialized in the socialist economy, but at the same time building on production and organizational practices already established before 1945.

The younger generation of managers was born in the 1940s and 1950s. Their careers began usually with university studies and then progressed through the corporate hierarchy. They gained important positions in Svit in the 1980s. Typically, they were experts in production technologies used in leather, rubber and plastics processing and footwear manufacturing, but did not have a background in management studies or the equivalent of today's MBA. Many of them were graduates of the Gottwaldov branch of the Technical University (based in Brno), which was the successor to the Baťa vocational school. Their expertise was in production and manufacturing. In the 1980s, training in finance and economics became increasingly important, as these skills were useful for the *perestroika* reforms. This younger generation of experts took over the company in the early 1990s.

Membership of the CPC was a *de facto* requirement for the vast majority of managers. This was a prerequisite for significant career advancement, as it was rather rare to secure a position in senior management without being a card-carrying member of the CPC. What was the gender profile of the top management? Although 62% of Svit's employees were women, most of them worked as production workers, in social services or in lower administrative positions (Šmejkal 2023: 391–394). Data from November 1987 on *nomenklatura* positions in the Gottwaldov plants and Svit administrative units (more than 20,000 employees) were as follows: among 48 top management positions there was 1 woman (head of the CEO's office), in the individual plants (207 management positions) there were only 14 female managers.[7] Women tended to be in lower management positions, such as workshop forewomen.

[7] Ibid., Osobní oddělení, i. č. 269, k. 865, Návrh postupu zabezpečení výrazného zvýšení žen v KR nomenklatury ÚV KSČ a nomenklatury PV KSČ, 16. 11. 1987.

However, they did not have access to the structures that determined how the company operated. Another common feature of Svit's management was its close connection to the city and the region. Managers usually spent most of their careers at the company and often came from Gottwaldov and the surrounding area, or from other centers of the shoe industry. These local and regional ties were very strong. Multi-generational links with the company dating back to the inter-war period were no exception.

The examples of the three CEOs who led Svit in the 1980s and immediately after 1989 illustrate the different forms of managerial careers. Josef Kadlec was CEO of Svit until 1987. Born in 1927, he joined the CPC in 1946 and worked as a laborer until 1949. He then became a "political worker" in the Border Guard and held similar positions in the structures of the Ministry of the Interior and the CPC apparatus until the mid-1960s. Kadlec was a professional apparatchik when he became the personnel director of Svit in 1965. During his time at the company, he obtained a degree in economic planning. It was his political credentials that propelled him to the top management positions until he became CEO in 1982.

The company's troubling results in the mid-1980s led to Kadlec's dismissal in 1987. His successor was František Vodák (born 1943), who had a degree in mechanical engineering from the Technical University in Brno. Vodák joined CPC in 1964 and from 1966 worked at the shoe factory in Třebíč (ZGK Třebíč), which was part of Svit. He worked first in research and development and then, from 1983 to 1987, as director of ZGK. From 1987 he was CEO of Svit, until he resigned, in January 1990, under pressure from revolutionary activists in the company's Civic Forum.

The Civic Forum's candidate for CEO was Vladimír Lukavský (born 1952), who led the company until 1997. Lukavský graduated from the University of Economics in Prague and joined CPC in 1984. From 1980 he worked as head of the finance department at the Svit headquarters. His appointment as CEO reflected an important change that took place with the economic transformation. After 1989, financial and business expertise became more important. This was the reason why an expert in financial management of the Svit Group became CEO.

The comparison of the three directors shows a trend in the change of competences required of Svit's top managers – political credentials useful in the so-called consolidation period after 1968, experience in footwear production technologies (not only director Vodák, but most of the top management) in the 1980s, and the ability to manage the financial flows of the company in the period of economic transformation. Until 1989, qualified and educated shoemaking experts coexisted in Svit with managers whose main competence was a long career in the CPC, including the "correct" political behavior during the purges of the CPC after 1968.

Svit's managers were mainly experts in technology, materials and production. Their major deficiency was a lack of training and experience in sales and marketing. Until the early 1990s, Svit did not sell its products. The shoe trade was in the hands of two separate state-owned companies. The domestic market was served by Obchod obuví (*Shoe Trade*), which supplied shops in Czechoslovakia. Exico, a "foreign trade company", was responsible for exports, receiving shoes from Svit, arranging contracts with trading partners and delivering products to foreign markets. When this system collapsed after 1989, Svit's managers faced

the difficult task of quickly learning new skills crucial to the company's survival. In a market economy, producers and suppliers also had to become traders. This was probably the biggest challenge for the former socialist managers. But it was not all that unexpected. *Perestroika* had already signaled that a new era was dawning for industrial management, but it was not an easy one.

Perestroika as the First Step to Capitalism

As Fritz Bartel shows in *The Triumph of Broken Promises*, *perestroika* was an attempt to impose economic discipline (Bartel 2022). He argues that it was the socialist equivalent of neoliberal reforms in the West and structural adjustment policies in the Global South. In Czechoslovakia, *perestroika* (*přestavba*) began in 1987. It brought industrial enterprises greater independence from the planning center, and with it the need for greater economic efficiency on the part of managers and workers. The company was to be fully responsible for itself. Its aim was to make a profit, and its future and the wages of its workers would depend on its profitability.

Svit was one of the companies covered by the new "State Enterprise Act" adopted in 1988.[8] The "state enterprise" was independent, but still subject to the five-year plan. The law introduced the so-called self-financing. The company covered its needs and costs from its business activities. It paid taxes and levies to the state, but could use the remaining profits for its own needs. The "founder" of the company played a key role. In the case of Svit, it was the Ministry of Industry that continued to have great powers over the companies – it could split them up, merge them, reduce their activities or introduce a "consolidation program". The law also introduced workers' self-management. Employees could elect self-management bodies, which in turn elected the company's directors. However, the Ministry proposed candidates for director and also had veto power over self-managements' decisions. While preserving the important role of central institutions, the law gave greater freedom to enterprises by allowing them to take full responsibility for their operations. This went as far as allowing enterprises to be closed down if they failed to perform. Workers' self-management was supposed to fulfill the democratizing dimension of *perestroika*. Its aim was to give democratic legitimacy to a more market-oriented and flexible approach to enterprise management.

Svit became a "state enterprise" in January 1989, but it had already begun to introduce reform measures in the previous year.[9] The easiest task to accomplish was the establishment of workers' self-management. The entire process, including the election of self-management bodies and the appointment of the director in the spring of 1989, was entirely under the control of top management. There were no unexpected events or conflicts and the incumbent CEO, Vodák, was confirmed in office. Rather than resulting in the democratization of power

8 The Act No. 88/1988 of 14 June 1988. The full version of the Act: https://www.zakonyprolidi.cz/cs/1988-88.

9 MZA – SOkA Zlín, f. Obuvnický průmysl – Svit, Ředitelna, i. č. 847, k. 201, Kolektivní návrh na založení státního podniku Obuvnický průmysl – Svit, Gottwaldov, March 1988.

hierarchies within the company, the implementation of self-management constituted a managerial strategy designed to retain control of the democratization process. Consequently, *perestroika* did not present a threat to the position of managers through pressure from below.[10]

Running the company independently was a more difficult task. Svit still had to carry out the plan – ensure the supply of shoes for the domestic market and fulfill export contracts. But the managers had to work with the profit category more than before. Svit's head of finance, Vladimír Lukavský, was the face of the campaign to promote the new management methods. He lectured employees that Svit had to be a profitable company first and foremost. It was necessary to make a real profit, which would determine not only Svit's success, but also how much its employees got paid.[11] Quality became a similarly important category. A high percentage of consumer complaints were warning signs. Svit had to put more emphasis on production technology, attractive design and branding. The company's future depended on making profits by producing high quality footwear.[12]

Managers thus focused primarily on increasing the efficiency of production. In the case of the shoe trade, however, they rejected the possibility of creating a trading infrastructure to replace the long-standing system of sales through state trading companies. Such fundamental restructuring of the relationship between production and sales was too big a task for them. It required building new facilities for marketing, advertising, business negotiations at home and abroad, or logistics. Svit was simply not in a position to make the large investments necessary to start its own trading business.[13] *Perestroika*'s visions clashed with the financial and human capacities not only of individual companies but of the entire Czechoslovak economy. Managers had more freedom than before, but lacked the autonomy and financial resources to implement large-scale strategic change. It was more profitable for the company to continue the established way of doing business than to embark on a risky project of building its own distribution infrastructure. The political framework of the late socialist economy also played an important role. The closed, centrally controlled and protected domestic market and the huge exports to the allied socialist countries ensured a secure market for a substantial part of Svit's production. *Perestroika* did not change this arrangement.

This meant that all innovations focused on manufacturing. The aim was to ensure quality and profitability through higher labor productivity, cost-effective materials management, smoother production and worker responsibility for the quality of the end product.[14] *Perestroika*'s ambition was to change managers' attitudes and workers' mentality through new

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10 Ibid., Osobní oddělení, i. č. 268, k. 865, Zpráva o výsledku a průběhu voleb ve státním podniku Obuvnický průmysl – Svit Gottwaldov, 11. 9. 1989.

11 Vladimír Lukavský, Komunisté do čela boje za efektivnost, *Tep* 30/1988 (15. 4. 1988), p. 1; –šum-, Koncentrovat síly strany na rozhodující úkoly, *Tep* 25/1988 (29. 3. 1988), p. 1. See also Jindřich Hlaváč, Zisk, *Tep* 12/1988 (12. 2. 1988), p. 1.

12 František Zapletal, Kvalita, *Tep* 14/1988 (19. 2. 1988), p. 1; Miroslav Fafílek, Kvalita je kvalitnější, *Tep* 41/1987 (26. 5. 1987), p. 1.

13 Miroslav Fafílek, O přestavbě ekonomického mechanismu, *Tep* 59/1987 (11. 8. 1987), p. 3.

14 Miroslav Fafílek, Cílem je kvalita a efektivnost. Hovoříme s ředitelem státního podniku ing. Františkem Vodákem, *Tep* 4/1989 (13. 1. 1989), p. 3; Vladimír Lukavský, Snižujeme nežádoucí náklady, *Tep* 88/1988 (18. 11. 1988), p. 1.

organizational measures and material incentives. Management buzzwords were flexibility, precision, high performance, individual commitment and motivation to do a good job. This also meant unpopular disciplining of employees through greater differentiation in pay and higher demands on individual performance.

The first step in this direction was the "experimental testing" (*experimentální ověřování*). The plan was to test new management measures in selected workshops or plants and later apply them throughout the company. In Svit, the experiment that took place in the Gottwaldov shoe plant was particularly important. This was a key production site for the entire group. The result showed how difficult and controversial such management efforts were. According to Miloslav Schwarz, director of the shoe plant, the project ran into "a completely impenetrable barrier of conservatism, reluctance and disregard for the CEO's instructions among some of the plant's managers".[15] In this instance, *perestroika* posed a threat to long-established power structures not through profound democratization of the workplace, but through its challenge to managerial expertise. The introduction of a new managerial approach required the development of new knowledge and the acquisition of new skills.[16]

The decentralization of the company was a key reform in which Svit's managers had high hopes. Svit was a huge company and centralized management of such a colossus was extremely difficult. The efforts to loosen the corporate hierarchy and introduce certain organizational flexibility, including downsizing the company, only really took off after the Velvet Revolution. In the years of *perestroika*, however, decentralization was a bold vision and many were convinced of its necessity, but the broader political framework for its implementation was not yet in place. This case study shows that the hints of reform in the late 1980s were a continuation of the late socialist technocratic arrangement. While greater autonomy of enterprises meant that management had more responsibility and power, self-management did not lead to weakening of management positions in favor of ordinary workers. In Svit, at least, self-management was an institution that gave democratic legitimacy to efforts to strengthen the power of managers. Its aim was to maintain the social cohesion of the company during the reforms. *Perestroika* was not supposed to change the technocratic organization of industrial work that was common to both state socialism and capitalism. Industry was to remain a hierarchical and depoliticized world in which professional managers made decisions and controlled subordinate workers. The change was the weakening of the planning center and the introduction of the market into the socialist economy. Although *perestroika* enhanced the authority of managers, sometimes even at the expense of the Communist Party apparatchiks, it also revealed the inadequacies in their expert knowledge.[17] With the collapse of state socialism, this crisis of expertise took on much more serious proportions.

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15 Miloslav Schwarz, Ověřování nového modelu řízení v obuvnickém závodě, *Tep* 4/1989 (13. 1. 1989), p. 1.

16 Svatava Navrátilová, Experiment, *Tep* 3/1990 (9. 1. 1990), p. 3; Pracovníci odboru odbytu, Experiment, *Tep* 6/1990 (19. 1. 1990), p. 2; Experiment II, *Tep* 7/1990 (23. 1. 1990), p. 3; Vladimír Lukavský, Experiment znamená pokus, *Tep* 9/1990 (30. 1. 1990), p. 3.

17 For an analysis of the interaction between industrial management and the CPC, see Štefek (2024).

Economic Transformation as a Struggle against Uncertainty

The Velvet Revolution had a profound impact on the industrial enterprises. Although, three decades on, the events of the late 1980s and early 1990s look like a sharp turning point, a sudden collapse of socialism followed by the rapid establishment of a new order, it was a more gradual process. This case study makes it possible to capture the interaction between the new and the old, between the revolutionary discontinuity and those elements of post-revolutionary development that built on the pre-1989 experience. Svit's managers had to cope with the impact of three major historical processes: the establishment of liberal democracy, the emergence of capitalism, and the acceleration of economic globalization. Each of these processes had its own pace, creating a particularly complex situation for managers.

The arrival of democracy was sudden and, immediately, it politicized the company. The intrusion of politics into relations between rank-and-file workers and managers in 1989 and 1990 posed a serious threat to the technocratic distribution of power in Czechoslovak industry. The impact of the Velvet Revolution on Svit's top management was ambivalent. On the one hand, the revolution appeared to be a triumph of technocratic continuity. Svit's Civic Forum primarily represented the interests of the white-collar workers who had founded this revolutionary organization in the company.[18] This meant that the Velvet Revolution in Svit was first and foremost a revolution of managers. At the beginning of 1990, the Civic Forum forced CEO Vodák to resign and recommended Vladimír Lukavský as his successor.[19] A champion of the *perestroika* reforms and a key member of top management in the second half of the 1980s, Lukavský guaranteed significant managerial continuity.

Managers who had held important positions before the revolution, many of them former members of the CPC, formed the new top management. In the course of 1990, the previous revolutionary unity broke down. This was followed by a sharp political conflict within the company. The newly formed independent trade unions and some representatives of middle management began to criticize openly the continuing power of the former communists. The politicization of Svit was thus primarily a dispute over the decommunization of the company. This was a novelty for top management, as it challenged the technocratic arrangement of the power relations in Svit. It was an overtly political critique, based on value positions rather than economic arguments or quantitative data. Opponents of the post-revolutionary top management spoke of a half-hearted revolution that left the so-called "old structures" – former members of the CPC who had run the company before 1989 – in key positions. The trade unionists and their allies demanded a more consistent decommunization of Svit. The aim was not only to democratize the company, but also to increase career opportunities for employees who had not been communists before 1989 and therefore could not aspire to senior management positions. Critics of top management also linked anti-communism to criticism of the management's expertise. If Svit's economic problems were

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18 Požadavky a náměty Občanského fóra s. p. Svit, *Tep* 1–2/1990 (5. 1. 1990), p. 1.

19 František Vodák, Vážení spolupracovníci…, *Tep* 6/1990 (19. 1. 1990), p. 1; OF Svit k návrhu kandidáta na ředitele s.p., *Tep* 7/1990 (23. 1. 1990), p. 1; Kandidát OF Svit na ředitele státního podniku, *Tep* 8/1990 (26. 1. 1990), p. 1; Ing. Vladimír Lukavský ředitelem st. podniku, *Tep* 58/1990 (3. 8. 1990), p. 1.

the result of communist rule, shouldn't former communist and thus incompetent managers have left their positions?[20]

The dispute culminated in the summer and autumn of 1990.[21] Top management countered anti-communism with arguments based entirely on technocratic logic. The CEO and his allies rejected this anticommunist politicization. They posited that the realms of politics and expertise are distinct and separate. According to them, the main criterion for selecting managers was their expertise, not their political past. They argued that removing all former communists would destabilize the company. If Svit was to survive the transition to a market economy, it was necessary to make maximum use of the technical and managerial expertise available – regardless of the fact that the expert might be a former communist. Politics had no place in the company.[22]

The emphasis on technocratic separation of management expertise from politics was clear continuity with state socialism. This argument helped to placate disgruntled employees and maintain strong continuity of top management with the pre-revolutionary era. It reflected wider developments in Czechoslovak industry in the early 1990s, when more radical demands for decommunization of the corporate sphere failed. Moreover, in April 1990, the new "State Enterprise Act" abolished workers' self-management and weakened significantly the position of those calling for the establishment of industrial democracy in Czechoslovakia, for example in the form of greater worker participation in decision-making. It was a triumph of technocratic continuity and expertise over revolutionary radicalism (Rameš 2021, p. 86–94). From this perspective, it could be argued that for corporate and regional technocrats, the Velvet Revolution was ultimately a means of consolidating their class power.

In contrast to these hectic political events, the building of capitalism was a long-term process whose impact on industrial enterprises and their management was gradual. Furthermore, the consequences of this development proved to be considerably more ambiguous than the outcome of the conflict between senior management and anticommunist activists in 1990. It took several years for large enterprises to be privatized. For the first three years after the Velvet Revolution, Svit was still state-owned and its management interacted closely with the higher political institutions (government, Ministry of Industry). Similarly, the creation of a market environment in the country continued throughout the 1990s. The aforementioned developments presented managers with unforeseen challenges. Many of them threatened the very existence of the company as well as the authority of top managers.

Svit's managers were convinced that the prerequisite for the company's success in the market economy was its privatization. The Canadian company Baťa seemed to be the ideal foreign partner for Svit. When Tomáš Baťa Jr., the son of the company's founder,

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20 Jiří Košťál, Prosperující podnik, nebo zaopatřovací ústav?, *Tep* 9/1990 (30. 1. 1990), p. 1.

21 Odbory versus vedení podniku, *Tep* 66/1990 (21. 8. 1990), p. 1; Utrpí podnik šok?, *Tep* 73/1990 (23. 9. 1990), p. 1; Petr Ševela, Otevřený dopis řediteli s. p. Svit ing. Lukavskému, *Tep* 81/1990 (23. 10. 1990), p. 1; Zdeněk Friedrich, Otevřený dopis podnikovému řediteli, *Tep* 86/1990 (9. 11. 1990), p. 2.

22 Vladimír Lukavský, Odpověď na otevřený dopis, *Tep* 83/1990 (30. 10. 1990), p. 1; Svatava Navrátilová, Hovory s náměstkem, *Tep* 87/1990 (13. 11. 1990), pp. 1–2.

visited Gottwaldov and the Svit factories on 12 December 1989, many predicted that the Canadians would take over Svit. Negotiations with Baťa began, which soon turned from revolutionary euphoria into a protracted dispute between Baťa and the state. Since returning the company to the Baťa family would violate Czechoslovak law, negotiations began in 1990 to allow Baťa to privatize Svit as a foreign investor. The representatives of Baťa carried out a detailed analysis of Svit, including the possibilities of its restructuring in the new economic conditions. Negotiations between Baťa and the state lasted until the autumn of 1991. While the takeover of the Czechoslovak footwear giant was too much for Baťa, the state refused to finance the restructuring of Svit and the subsequent transfer of its promising parts to the Canadian company.[23] Negotiations ended in a compromise: Baťa took over one of Svit's production plants in the East Moravian town of Dolní Němčí and acquired a network of shoe shops from the state.

Svit's managers were excluded from these negotiations. They were supposed to prepare Svit to function in a market economy, but at the same time they could only urge the state to decide on the company's fate as soon as possible. This demonstrated the limited options available to managers. The economic transformation gave Svit's managers a free hand in many ways, but the fundamental decisions about the company's future were still in the hands of the state, which wrote the rules of the new capitalism, including the privatization of Czechoslovak industry. When it became clear that Baťa would not acquire Svit, the company was privatized under the voucher-privatization program. In May 1993, the Ministry of Privatization approved a privatization project prepared by Svit's management. According to the project, 61% of the shares of the group went into the second wave of voucher privatization and 34% of the shares were offered for public tender. The 34% stake was acquired by a consortium of Investiční banka (*Investment Bank*, later Investiční a poštovní banka – IPB), První akciová investiční společnost (*First Joint Stock Investment Company* – PIAS, a subsidiary of IPB) and TOMA tanneries (formerly part of the Svit group) for CZK 570 million.[24] The negotiations with Baťa demonstrated the limitations of managerial autonomy vis-à-vis the state. The subsequent events following the privatization of the company demonstrated the limitations of their expertise.

After three years of wrangling, the company was under the control of local management and Czech owners. There was no significant intervention in the composition of top management and no radical restructuring of the kind that a foreign investor might have undertaken. The managers in Zlín had a free hand in the implementation of a plan that had

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23 V. Kupcová, Causa Baťa: Stále ještě není jasno, *Zlínské noviny* 28/1991 (12. 4. 1991), p. 3; MZA – SOkA Zlín, f. Obuvnický průmysl – Svit,f. Obuvnický průmysl – Svit, Ředitelna, i. č. 875, k. 213, Spolupráce kanadské firmy Bata Shoe Organization s čs. obuvnickým průmyslem, 6. 8. 1990.

24 Pavel Pastuszek, Jak pokračuje privatizace a. s. Svit, *Tep* 44/1992 (17. 11. 1992), p. 1; Pavel Pastuszek, Privatizační projekt a. s. Svit schválen, *Tep* 26/1993 (30. 6. 1993), p. 1; K privatizaci a. s. Svit, *Tep* 27/1993 (8. 7. 1993), p. 1; Ilona Šumíčková, Svit před privatizací. Hovoříme s ředitelem sekce komplexní strategie, *Tep* 33/1993 (1. 9. 1993), pp. 1–2; Třetina svitu privatizována, *Tep* 44/1993 (17. 11. 1993), p. 1; S ing. V. Lukavským hovoříme na téma: Privatizace Svitu, *Tep* 47/1993 (8. 12. 1993), p. 1.

already been on the drawing board during *perestroika* – the decentralization of the company. Already in 1990, some parts of Svit became independent, such as the shoe factories in Třebíč, Skuteč or Světlá nad Sázavou. The privatization allowed the company to establish a holding structure with independent subsidiaries (mostly former production plants) under the parent company. In 1995, the Svit group consisted of the parent company, eight wholly owned subsidiaries and six other companies in which the holding company had a majority shareholding.[25]

The holding company organization, which was very popular in the Czech Republic in the 1990s, was intended to allow flexible management of large industrial groups (Clark and Soulsby 1999). However, it did not solve the fundamental problem inherited from central planning. The management responsible for transforming the company was still largely made up of shoemaking professionals, not sales and marketing experts. Svit's top management was well aware of this. They wanted to strengthen marketing activities and build a business infrastructure for the domestic and foreign markets. This was a difficult task in a situation of rapid liberalization of the Czechoslovak consumer goods market. In the dynamic environment of post-socialist capitalism and in such a short period of time, it was almost impossible to acquire and apply know-how that the company had not sufficiently cultivated for several decades.

It became increasingly difficult for Svit to operate in the deregulated market. Managers accustomed to the strong position of the state in controlling the economy suddenly found themselves dealing with a state that refused to regulate their industry, for example by imposing import tariffs.[26] The chaos of nascent capitalism replaced the long-standing state-controlled production and sale of consumer goods, with which Svit's managers were well acquainted. The problem, for example, was the illegal import of shoes from Asia and their sale outside the traditional trade network.[27] Svit's managers also struggled with the problem of chronic insolvency. Customers owed Svit, and Svit owed its suppliers. The desired independence and entrepreneurial freedom proved to be a difficult task under such conditions.

Svit also found it challenging to adapt to the accelerating pace of economic globalization. It was evident that no Czech actor, entrepreneur, or state had any control over these forces. In contrast to the gradual formation of the rules and institutions of post-socialist capitalism, the effects of economic globalization were uneven and often unpredictable. Some events were immediate, such as the opening of the Czechoslovak market to imported goods. By contrast, the collapse of the Cold War regime of economic relations, in this case primarily between Czechoslovakia and the USSR, did not occur until 1991. Two years after 1989, Svit's managers had to deal with the sudden end of the long-term export model that had largely determined the volume and structure of the company's production. On the other hand, the impact of the global transformation of the footwear industry on Czechoslovak and later

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25 Ilona Šumíčková, Svit Zlín s pěti novými dcerami. Ruský dluh byl přerozdělen na nové subjekty, *ZRNO* 4/1995 (17. 10. 1995), p. 2.

26 Pomůže vláda řešit problémy výrobců obuvi?, *Kožařství* 2/1993, p. 61.

27 Vlastimil Kolařík, Oficiálně ilegální cesty, *Kožařství* 10/1998, p. 2; Vlastimil Kolařík, Dva různé metry, *Kožařství* 11/1998, pp. 5–6.

Czech shoemakers only became fully apparent in the mid-1990s. This development demanded a wholly distinct set of expert skills from those employed in the central planning system. Although top management had complete control of the company following privatization, its expertise was not sufficient to address the challenges it faced.

In 1990, Svit's managers did not associate the end of state socialism with the end of the company's export model.[28] They expected the company to maintain its markets in Eastern Europe and increase exports to Western Europe and North America significantly. This was the only way to maintain Svit's large production volume, extensive production infrastructure and workforce. Although internally concerned about the stability of the Soviet market, they attempted to negotiate another contract in 1990 to supply footwear to the USSR in 1991.[29] The state was again a key player, with the signing of a trade agreement with the USSR in September 1990. Svit was among the Czechoslovak companies that were to supply goods to the USSR. In return, the Soviets were to provide Czechoslovakia with raw materials such as oil. The dollar payments were to be transferred to clearing accounts in Czechoslovakia and Moscow. After the balance of payments between the banks had been settled, the money paid for the shoes in the USSR was to be transferred from the Czechoslovak bank to Svit (Grác 2023: 48–51).[30]

This business came to an abrupt end in 1991 with the dissolution of the USSR. While Svit was producing and shipping shoes to the USSR, the payment system stopped working. Svit's managers watched as the production and supply strategy that had sustained the company's existence collapsed before their eyes. The company was not paid for $40 million worth of goods. At the time it was more than CZK 1 billion. In November 1991, Svit was forced to stop deliveries and production for the USSR.[31] The case was widely publicized and led to a political dispute. The company asked for bridging loans from the state, while some politicians criticized Svit's management for supplying goods to the USSR when it was clear that payments from the USSR would not reach Svit.[32] Svit's managers defended themselves by arguing that it was the state that had negotiated and guaranteed the contract. They assumed that even in a market economy the state guarantee would provide certain security.

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28 MZA – SOkA Zlín, f. Obuvnický průmysl – Svit, i. č. 883, k. 216, Program odstátnění a následné privatizace ve Svitu Zlín, 17. 9. 1990; Ibid., i. č. 867, k. 211, Návrh na založení státního podniku, 8. 6. 1990 and Návrh na založení akciové společnosti Obuvnický průmysl – Svit, Zlín, 21. 11. 1990; Máme obrovskou šanci pozvednout podnik na světovou úroveň, *Tep* 18/1990 (2. 3. 1990), p. 1 and 2, *Tep* 19/1990 (6. 3. 1990), p. 1 and *Tep* 20/1990 (9. 3. 1990), p. 1.

29 MZA – SOkA Zlín, f. Obuvnický průmysl – Svit, Ředitelna, i. č. 868, k. 211, Informace o kontraktu SSSR 1991, příprava ZOČ, October 1990; Ibid., Rizika roku 1991, December 1990.

30 Author's interview with Pavel Pastuszek, the head of the Svit strategic development department in the early 1990s, conducted on October 13, 2023.

31 Vladimír Lukavský, Vývoz obuvi a.s. Svit Zlín do SSSR, *Tep* 46/1991 (26. 11. 1991), p. 1–2; V. Příkazský, Tisková konference o situaci ve Svitu, *Tep* 46/1991 (26. 11. 1991), p. 1; Vladimír Lukavský, Jiná cesta není, *Tep* 46/1991 (26. 11. 1991), p. 1.

32 (ara), Ministr ve stínu, *Český deník* 49/1992 (27. 2. 1992), p. 5; Vladimír Lukavský, Stanovisko Svitu, *Tep* 8/1992 (25. 2. 1992), pp. 1–2.

The case had a fatal effect on the company's financial position, and Svit never recovered from the Soviet debt. It was also a serious blow to the company's reputation. In 1990, Svit's managers presented the company as a world-leading manufacturer continuing the glorious tradition of Czechoslovak shoemaking. Two years later, they were in charge of a company on the brink of bankruptcy, with the image of a socialist juggernaut that produced too many goods and employed too many people.[33] Although the Czechoslovak government was responsible for designing, negotiating, and guaranteeing the business model that collapsed spectacularly in 1991, the public perceived the primary responsibility to lie with the top management of Svit. This affair damaged irreparably the reputation of the company's top management. If expertise constituted a pillar of the managers' power position, then in the case of Svit this foundation was cracked severely already at the beginning of the 1990s.

The impact of the globalization of the footwear industry on Svit was more gradual. Svit's position in relation to the international situation in the footwear sector became increasingly untenable.[34] In the 1990s, the long-term global trend of relocating footwear production to regions with cheaper labor affected former socialist countries. Svit's managers found themselves in an impossible situation. Their company was producing goods that were unattractive both to domestic and foreign markets. At the same time, Svit could not offer Western manufacturers subcontracting conditions that could compete with those offered by Balkan, let alone Asian, countries.

The top management, which changed frequently since the mid-1990s, downsized the company and reduced production volumes. By the end of the 1990s, Svit was a shadow of its former self, employing around 5,000 people and struggling not only with the transformation recession (which hit the country in the late 1990s) but also with creditors' claims and ownership disputes within the holding company.[35] Managers also tried to promote Svit as a Czech company producing quality Czech shoes. They presented Svit as a domestic and qualitatively superior alternative to cheap and low-quality imported shoes, especially from China. This strategy did not work. Around 2000, Svit went bankrupt. The collapse of the former shoe giant marked the end of mass production of footwear in the Czech Republic and was the most visible symbol of the deindustrialization of the Czech shoemaking.[36]

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33 Naléhavá interpelace na vládu České republiky od poslance ČNR V. Čundrleho, *Tep* 46/1991 (26. 11. 1991), p. 3; Odpověď na interpelaci, *Tep* 4/1992 (28. 1. 1992). p. 1; Svit se blíží kolapsu. Interpelace poslance Federálního shromáždění České a slovenské federativní republiky Pavla Dostála adresovaná Mariánu Čalfovi, předsedovi vlády ČSFR, *Tep* 5/1992 (4. 2. 1992), p. 2; Ministr fandí Svitu, *Tep* 7/1992 (18. 2. 1992), p. 1; Stanovisko Svitu, *Tep* 8/1992 (25. 2. 1992), pp. 1–2.

34 Vlasta Mayerová, Hodnocení vývoje v obuvnickém průmyslu ČR 1989–1996, *Tep* 5/1997 (14. 5. 1997), p. 3 and (šum), Těžké časy obuvníků, *Tep* 12/1996 (18. 12. 1996), p. 1.

35 Krajský obchodní soud prohlásil konkurs na Svit, *Zlínské noviny* 215/2000 (14. 9. 2000), p. 1.

36 Svit mizí z obuvnické mapy světa, *Zlínské noviny* 13/2002 (16. 11. 2002), p. 8.

Conclusion

This article shows that the activities of managers in the era of economic transformation, their long-term plans and their momentary decisions were the result of a complex and ambivalent interaction of continuities and discontinuities in managerial practice and thinking. The strategies of corporate management were based on the technocratic regime of power relations that had become firmly established in Czechoslovakia after 1968. The combination of managerialism at the enterprise level and the strong authority of the state and the CPC determined the politics of expertise in late socialist industry. The prevailing management culture and the configuration of power relations exerted a profound impact on the conduct of industrial management both before and after 1989. While the Velvet Revolution brought liberal democracy and capitalism to the country, at the corporate level it allowed the existing technocratic order to persist. There was no strengthening of workers' self-management or long-term empowerment of the newly established independent unions. The new order enhanced the authority of managers by removing them from the supervision of the planning center and the communist apparatchiks. At the same time, it did not allow for significant strengthening of workers' power at the expense of management's authority. Furthermore, a portion of the managerial cadre has acquired an ownership stake in the former state-owned assets.

The ambivalence of the impact of economic transformation on managers consisted in the fact that the continuities in the industrial power structure were accompanied by a crisis of managerial expertise. The capacity to organize production in industrial enterprises constituted a significant foundation for managerial authority. However, this expertise was tested severely in the late 1980s and early 1990s. Although the hierarchical structure of power within enterprises remained largely unchallenged from below, the specific expert knowledge that underpinned the authority of managers in the central planning system was only partially applicable after 1989. In terms of the authority of expert knowledge, *perestroika* and subsequent transition to capitalism had a profound impact on the Czechoslovak managerial class. In particular, this was the case in those industries and enterprises for which the economic changes represented a struggle for survival. Although the Velvet Revolution reinforced the role of managers as the sole decision-makers in companies, the advent of capitalism undermined their expert authority. The market economy required a different kind of expertise on which the technocratic power of managers could rely in the long run. Consequently, managers in industrial enterprises were simultaneously strong and weak.

If one is to posit the existence of an elite pact of dissidents and technocrats as the new power arrangement in post-socialism, this scheme may be valid at the level of central political institutions. However, at the regional level and in individual enterprises, the situation was more complex. In this case, lower-ranking technocrats, specifically industrial managers, did not seek support from former dissidents, but mainly from state institutions. When the revolutionary events were over, it became clear that industrial management did not need the strong anti-communist legitimacy that the central-level technocrats required (and got from the former dissidents). Nevertheless, corporate management required the practical support of the state to counterbalance the crisis of managerial expertise and provide a shelter from the upheavals brought about by the transformation from socialism to capitalism and by economic globalization. If the new democratic political elites supported managerial power at

the expense of employees in 1990, industrial management expected similar support in areas where managerial expertise was crucial. The fact that managers did not have to share decision-making powers with workers' self-management or be accountable to powerful trade unions did not change the fact that navigating the troubled waters of the new capitalism required competences, knowledge and financial capital. Managers clearly expected significant support from the state, as they were accustomed to in the era of central planning, or as was common in capitalist countries that relied on active industrial policy.

Managers retained decision-making powers after 1989, but faced political and economic forces beyond their control. In the 1990s, the limits of this technocratic order became apparent. Rather than the pressure of democratic politics or anti-communism on former socialist managers, the source of these problems was the crisis of managerial expertise. Although managers were among the symbols of the emerging market economy and managerial language permeated political and popular discourse, developments after 1989 demonstrated the limited power of the domestic managerial class in a small post-socialist country. Long-term trends associated with economic globalization, as well as sudden changes in the international order, national economic strategies and economic culture, created many serious problems for industrial management. The example of Svit provides ample evidence of these post-socialist contradictions and their impact on industrial management. Although the managers at Svit gained the autonomy they had long demanded, they found that they needed a strong interventionist state for the survival of the company and the industry as a whole. They wanted to maintain the inherited technocratic order within the company (managerial authority without industrial democracy), to be market actors independent of the state, but at the same time to have state protection from economic and political forces of capitalist globalization. For them, the ideal economic order would have combined strong and highly technocratic managerialism, a protected domestic market and a company-friendly state industrial policy. However, economic and political developments moved in a different direction. It is a question for further research whether such a potential arrangement of post-socialist capitalism could have been attractive to the managerial class in general, or whether it was specific to industries that were extremely exposed to the pressures of globalization and declined in the 1990s.

The position of managers from regional industrial enterprises in the power hierarchy of post-socialism was therefore quite precarious, particularly if their enterprises did not belong to the sectors preferred by the state or foreign investors. If these managers did not choose a quick exit strategy in the early 1990s, namely leaving for other companies or setting up their own businesses in other industrial sectors, they faced an uphill struggle to save their company in adverse economic conditions. This made it challenging for these managers to gain significant political influence at the regional and national levels, or even to become prominent figures in national oligarchic structures.

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Author

Vítězslav Sommer is a researcher and deputy director at the Institute of Contemporary History of the Czech Academy of Sciences in Prague. His research focuses on economic and social history and the history of expertise in state socialism and post-socialism. His publications include articles in *Studies in East European Thought* and *History of Political Economy*. He is the principal investigator of the research project "Deindustrialisation and the New Economic Order. The Regional Economy and the Zlín Shoe Industry between Central Planning and the Market Economy" funded by the Czech Science Foundation (2024–2026).
Contact: sommer@usd.cas.cz

Thank God for the OECD – Modalities of Expertise in Current Education Policy in Slovakia[1]

Ondrej Kaščák

ABSTRACT This study is concerned with identifying specific features of the expertise that forms the basis of the proposed systemic and curricular education reforms in Slovakia. The reforms are set out in Component 7 of Slovakia's Recovery and Resilience Plan. A bibliographic analysis was performed on the 51 references contained in Component 7 in order to ascertain what type of evidence it is based on. The findings show that much of the evidence is international in character, consisting primarily of data produced and published by the OECD and EU as well as basic quantitative data from large-scale international assessments. These findings contradict those of bibliographic studies on reform expertise in Nordic education, in which the dominant forms were national expertise and expertise based on secondary interpretations of data from international comparisons. Our study shows that the expertise in the reform documents reflects the characteristics of those the expertise is targeted at and the nature of the institutional structures involved in policymaking. These are different in Slovakia, where research and higher education institutes do not form part of an evidence gathering system.

KEYWORDS education policy, expertise, Slovakia, Recovery and Resilience Plan, bibliographic analysis, large-scale assessments, OECD

Introduction

Strategising systemic education reform became a national sport after the fall of the Iron Curtain and the founding of the Slovak Republic (in 1993). In the 30 years since independence there have been at least eight strategies for systemic education reform[2], which is at least one strategy every four years, or more than one per standard electoral term. The strategies have been implemented in the legislation or in practice to varying degrees (Kascak 2021). The documents themselves differ in terms of the notional axis: ideology-science/declaration–evidence. Generally, one can conclude that the direction of travel has been from the value-based strategies of the 1990s and the beginning of the millennium towards various types of data- and evidence-based ones.

The same trend can be seen in the performance of education and public policy generally and was evident in Western public policy before it emerged in post-socialist countries. This change dates back roughly to the second half of the 1980s and was ironically referred to as

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[2] Duch školy [Spirit of the School], Konštantín [Constantine], Milénium [Millennium], Reforma 2008 [2008 Reform], Minerva, Učiace sa Slovensko [Learning Slovakia], National Programme for Education, Vzdelávanie pre 21. Storočie [Education for 21st Century]

"governing by numbers" by Rose (1991). As the term indicates, policy is increasingly based on a particular kind of evidence – quantitative data.

> …there is a constitutive interrelationship between quantification and democratic government. Democratic power is *calculated power*, and numbers are intrinsic to the forms of justification that give legitimacy to political power in democracies. (Rose 1991: 675)

Statistics and numeric data have become "intrinsic to the forms of justification" used in policy and decision-making. Indeed, Angermuller and van Leeuwen (2019: 91) adopt Foucauldian terminology and talk of "numerocratic governmentality" or "numerocracy", which is a specific type of governance and policy decisionmaking based on statistics and quantification. Data collection, production and analysis is now a key skill-set among policy support providers. But this change in policy is far from isolated. It is a response to social change and social practices in which the drivers of quantification are digitalisation and economisation. And as such it prompted Mau (2017) to discuss the wider social phenomenon of the "quantification of the social", the "all-pervasive phenomenon of sociometrics or the metric society" (p. 10) that affects many areas of our lives.

In education policy the quantitative data obtained from international assessments has tended to be politically constituted; as "international comparative testing became one of the prime instruments in the steering and exchange of governing knowledge in education in Europe today" (Grek 2013: 704). These days successful education policies rely on quantitative expertise relating to international assessments performed by transnational organisations (most frequently the OECD). The discourse and experts represent a new political force that Grek (2013) has labelled an expertocracy. In other words, governance through the production of quantitative expertise. In education it is based mainly on international comparative assessments.

In post-socialist countries, such as Slovakia, one might expect some degree of historical continuity with the new "social quantification". After all, socialist policies were rooted in "social engineering", a type of expertocracy where "the social engineer uses the scientific method to determine social policy through the implementation of rigorous research strategies" (Murphy 1981: 11). However, long-term social planning based on quantification proved a failure, particularly in the economic sphere (Hoppe 2010). Social policy was more prospective and relied less on evaluation and comparison. The data was produced both nationally and locally. After the fall of the Iron Curtain, the new forms of expertise did not follow on from their socialist historical equivalents in qualitative terms. Instead, the old social reports were dropped and new ones were slow to appear. That meant that Slovakia both lagged behind Western countries (in having more ideologically oriented politicians in the 1990s) and was more politically dependent on developments in the West. A new expertocracy therefore had to be developed in Slovakia.

Nevertheless, this proclivity is currently constrained by the diminished political authority of science, which can at times engender a reluctance to pursue political legitimation through expertise. Gauchat (2023: 270) states, that "the association between political orientation and public confidence level in the scientific community continues to intensify

over each decade, with those identifying as more conservative indicating greater distrust and skepticism toward organized science". Post-pandemic data suggest that science "is experiencing an unprecedented legitimacy crisis" (p. 271). These tendencies may affect the position of expertise within political legitimation.

This study looks at the type of expertise that underpins education policy in Slovakia today. We are particularly interested in the discourse found in the main strategic document guiding the reforms and their implementation in the education sector – The Slovak Recovery and Resilience Plan. Does the expertise on which this strategy document is based align with the numerocratic trends in the development of contemporary expertise, as discussed above?

Expertise in Education Policy

Back in the 1980s Weiler (1983) distinguished three "strategies of compensatory legitimation in education policy" – Legalisation (Judicialisation), Expertise and Participation. He argued that the education sector required especially high levels of legitimation because it was undergoing a crisis of confidence. Legalisation refers to the "increased invocation of legal norms and institutions", expertise to the utilisation of scientific experimentation and planning, and participation to client participation in the policy process (p. 262). Of these three types of legitimisation, expertise has the highest credibility as it is rooted more in argumentation than legalisation and is less susceptible to manipulation than participation is. Expertise refers to "the utilization of research-based knowledge in the process of making policy" (p. 269). The strength of legitimisation in introducing systemic education reforms stems from the "experimentation" used in the expertise, that allows one to "say, with scientific conviction and credibility, that one social program was 'better' than another" (p. 269). It employs research-based data.

The increasingly powerful status of expertise in education policy has led to the scientisation of politics. But that is not to suggest that political legitimisation through expertise excludes political and critical discussion. "Scientification of politics is simultaneously connected with a politicisation of science…" (Kleinschmit, Böcher and Giessen 2009: 311). Political interests and objectives can give rise to disputes between politicians and experts. And there is the potential for expertise to be deliberately or strategically exploited. One also has to take into account differences in the amount of power and resources wielded by politicians and experts and the interdependencies.

These days we are facing the "pluralisation of expertise", stemming from "greater public engagement in agenda setting as a result of open access to information" (Steiner-Khamsi 2022: 36). That means that expertise can be discussed more widely and even alongside "counter expertise from civil society actors" (Kleinschmit, Böcher, and Giessen 2009: 311). Where and how the expertise is produced is crucial here – and to what extent the context is politically dependent. Is the expertise produced locally by the state bureaucracy within a ministry or administration, or is it produced by a permanent or ad hoc expert commission, or an external actor such as a think tank, research body, university and so on. Ozga (2020) states that expertise is increasingly less likely to be accumulated in state bodies by closed elites.

> …nation state-centred governing is in decline, hierarchical organisation and formal regulation are increasingly displaced by networks and standards, and formal policy actors are replaced by a diversity of actors, public/private hybrids and non-formal actors (consumers, third-sector members, media) and guided in action by data. (Ozga 2020: 55)

The availability of comparative data on education and schools is reliant on the "growth of technical expertise and the increased power of technocrats in framing policy issues and their solutions" (p. 66). Thomson, Savage and Lingard (2016: 8) state that for developing expertise "qualifications in economics, psychology, quantitative measurement and psychometrics are particularly favourable it appears".

In relation to the pluralisation of expertise they note that another typical feature of expertise is mediatisation. The new media technologies enable the public circulation of data and the dissemination of ideas. "Expertise is assumed through mediated contexts, and the best way to become an expert is to assume the right to comment" (Thomson, Savage, and Lingard 2016: 8).

Context of the Study

As pointed out in the introduction, during Slovakia's relatively short history, education and schooling have been shaped by the emergence and implementation of various reform strategies. A European Commission report (2017) noted that the sources of evidence used in education policy in Slovakia came from higher education institutions and research agencies, national statistics and ministerial departments, public and stakeholder consultations, and trade unions and employers' organisations. This is a much smaller network than that found in other EU member states. In Finland, for example, there are more evaluation or testing agencies, think tanks and other consultants. Moreover, the sources of evidence that inform education policy are organised officially. By contrast, in Slovakia, higher education institutions and research agencies are used on an ad hoc basis and the evidence produced by national research agencies is not a mandatory systemic component of education policy-making. Within the education policy-making process there is

> an internal commenting phase … within the Ministry of Education's departments and advisory bodies (e.g. Board for System Changes in Education). The proposals are then sent for 'intersectoral commenting' to other ministries such as the Ministry of Finance, the Ministry of Economy, the Ministry of Labour, Social affairs and Family, the social partners, as well as other institutions such the National Institute for Education. … Apart from this procedure, there are no other formal or informal ways to consult evidence providers. Moreover, there are no knowledge brokers or brokerage agencies, either formal or informal. (European Commission 2017: 34)

The expertise therefore emerges under rather closed conditions and frequently does not take into account the outputs of academic institutions; rather the intention is to mediate with and balance the power relations between the various stakeholders. The evidence produced is therefore shaped by engagement with internal departments and institutions, such as the Institute of Education Policy, which operates under the remit of the Education Ministry.

It was under these conditions that the most recent systemic education reform project emerged in 2021. However, it differed from previous ones in that it was begun during the coronavirus pandemic and designed with the funding provided by the European Union's Recovery and Resilience Facility in mind. As a result, the systemic education reforms are part of Slovakia's extensive Recovery and Resilience Plan (Plán obnovy 2021). That is a key factor as it had a fundamental impact on the discussions and expertise that form the basis of the document. Thus, the proposed education reforms did not just have to convince the Slovak public but the European Commission as well. In drafting the reforms Slovakia had to rely on evidence that would convince the European bodies of the substance and validity of the reforms and compliance with the EU's criteria. It is therefore interesting to observe the type of evidence and expertise used in the document. Slovakia succeeded in its legitimisation role and its Recovery Plan was assessed as amongst the best in the EU (there were 11 criteria, and it was awarded the highest score A for ten of these and B for one criterion). Education was one of the key components in the plan. Its funding allocation amounted to 13.4% of the entire recovery plan budget and was the seventh highest in the EU after Sweden, Lithuania, Ireland, Hungary, Czechia and Croatia (Darvas et al. 2023).

The parts of the recovery plan relating to education were Components 6, 7 and 8. Component 7 is concerned with the systemic and curricular primary school reforms and is entitled Education for the 21st Century. The goal was described thus:

> The primary school curricular reforms will provide new educational content over three multi-year cycles. The teaching will not deliver ready-packaged information, but situations will be created so pupils can interpret the information in relation to real-life experience. The new curriculum will require new textbooks and teachers will have to be trained deliver the changes in the classroom. The reforms will also improve the pedagogical skills of teaching staff and encourage life-long professional development. The emphasis will be on inclusive education and the acquisition of digital skills. (Plán obnovy 2021: 266)

Under the systemic reforms, the existing two-stage primary school system will be replaced by a three-cycle system, extending early childhood education and thereby promoting inclusive settings. The curriculum will need to reflect this structural division, and the innovative content will strengthen specific competencies (critical thinking, digital competencies, soft skills etc). The new cyclical primary school structure represents the most substantial systemic education reform in Slovakia's modern history. This study will explore the expertise discourse legitimising this change under the recovery plan.

Method

The analysis is concerned with Component 7 of Slovakia's recovery plan – Education for the 21st Century – which deals with the systemic primary school reforms and related curricular reforms.

The following research questions were set:
1. What type of expertise in terms of the origin of its production (national versus international) is prevalent in this document?
2. What role do standardised large-scale international assessments and transnational organisations play in this expertise?
3. What types of evidence, in terms of publication type, is such expertise based on?
4. What is the position of traditional producers of expertise, such as universities, research institutes and analytical departments?

Component 7 of Slovakia's recovery plan contains 34 pages and is the main document covering the planned education reforms. We analysed the expert discussion in the document that legitimises the education changes. The analysis was performed using bibliometric analysis. "The bibliometric methodology encapsulates the application of quantitative techniques (i.e., bibliometric analysis – e.g., citation analysis) on bibliometric data (e.g., units of publication and citation)" (Donthu 2021: 286). One of the main techniques in bibliometric analysis is science mapping, which is used to analyse "intellectual interactions and structural connections among research constituents" (p. 288). The mapping source was a citation analysis: "using citations, one can analyze the most influential publications in a research field to gain an understanding of the intellectual dynamics of that field" (p. 288).

For the education policy and policy documents generally, a bibliometric analysis was adapted by a group of experts involved in the POLNET study (Policy Knowledge and Lesson Drawing in Nordic School Reform in an Era of International Comparison). In the POLNET study the bibliometric analysis "refers to how expertise outside individuals is visualized through bibliometric reference patterns" (Sivesind and Karseth 2022: 15). When using this type of bibliometric analysis, the specific nature of the policy documents and references has to be taken into account:

> References have several constitutive elements: an indication of authorship, year of publication, topic or theme, location of publisher, and type of publisher. The authorship may be further differentiated by gender, nationality, institutional affiliation, and, if several co-authors are involved, the network structure within the group of authors. All these constitutive elements are essential in a bibliometric analysis because they are utilized as epistemological cues for understanding not only whose texts or whose knowledge the authors have selected to substantiate their points, but also whose knowledge they cite as sources of expertise to reduce uncertainty or generate legitimacy about the validity of their own claims or assertions. (Steiner-Khamsi 2022: 33–34)

In policy documents references do not just point to the evidence but are part of the political game of legitimising the measures and convincing other policy actors, stakeholders and the public. This specific network of references therefore constructs a unique type of expertise used in education policy reform documents.

In the part of the recovery plan analysed (Component 7) we identified 51 references. This set of references was much smaller than the one examined in the POLNET study on education reforms in Nordic countries, where each country had multiple reform documents containing 50 to 264 references each (Baek, Tiplic, and Santos 2022: 264). The reason our study was

much smaller was that it looked at a specific reform set out in a single basic document with a specific legitimising function (to persuade the Slovak public and the European Commission) and was largely dependent on EU funding. Given the much smaller number of references, we do not use the complete network structure visualisation employed in the POLNET study.

Our analysis is limited to a selected number of indicators relating to the theoretical description of the problem set out in the first and second sections of this study and to the research questions we set. We were particularly interested in the origin of the references used in the document (domestic versus international) and the overall proportion of references to standardised large-scale international assessments in education and to documents issued by transnational organisations. We also studied the type of document referenced (Report/ Statistics, Book/Edited book, Journal Article, Policy Document). These basic indicators are used to help explain the nature of the expertise relating to the systemic and curricular reforms in Slovakia.

Results

Beginning with the formal aspects, it is worth noting that the references in the bibliographic section were not given in standard form and nor were they uniform throughout. Some parts of the bibliographic section were incomplete, with only the author and year of publication being supplied. That meant we had to search for the relevant source and find the bibliographic information. But this laxity points to something else: promoting the reforms took priority over academic rigour and the desire to understand the evidence. The scientific evidence was therefore of an ornamental nature, rather than being central to the argument.

The first key finding is that almost three-quarters of the references are from either a foreign or an international publication. The national references (from any type of publication) comprise slightly over a quarter of the references contained in Component 7. We can therefore conclude that the evidence is mostly international. More than a quarter of all the references in the document relate to standardised large-scale international assessments. The most common one is the PISA international assessments (13.7%), mainly from the 2012, 2015 and 2018 cycles. The dominant source of evidence from a transnational organisation was the EU (23.5%), followed by the OECD (5.9%). But it is worth noting that the OECD also runs several large-scale international assessments. In Table 1 these are provided separately from the other OECD documents. But if these were to be taken into account (OECD + PISA + PIAAC + TALIS), the OECD evidence would comprise 25.6% of all the references and, together with the EU evidence they would represent 49.1% of all the references.

Another key finding is that the most common type of document is reports/statistics (60.8%), followed by books/edited books (19.6%), policy documents (15.7%) and lastly journal articles (3.9%). Once can therefore conclude that most of the evidence is of a non-academic nature, as books/edited books and journal articles are usually scientifically verified and reviewed. The most rigorously reviewed academic outputs (journal articles) feature marginally in the document. Content-wise it is interesting to note that the journal articles referenced are from well-known economic journals rather than educational science ones. Indeed, there are no references to rigorously reviewed educational science articles.

Table 1: Reference distribution of all references in the document

Domestic	International	Standardised large-scale international assessments		Transnational organisations*	
25.5%	74.5%	PISA	13.7%	OECD	5.9%
		PIAAC	2%	UNESCO	2%
		TIMMS	2%	EU	23.5%
		PIRLS	2%		
		TALIS	4%		
		ICILS	2%		
		Total	25.7%	**Total**	31.4%

* References related to large-scale international assessments have been excluded

Furthermore, the most common type of evidence in the high proportion of reports and statistics is, naturally, numeric and quantitative data. Unsurprisingly evidence from the OECD is the most frequent type of evidence in the report/statistics category (41.9%), with much less produced by the state (19.4%). The OECD publications all fall into the report/statistics category. Looking at the evidence gathered by the government/state, we find that all it belongs to the report/statistics and policy document categories. The data gathered by the non-governmental sector is published in reports and books/edited books. The most-wide ranging evidence referenced in Component 7 is of EU origin, in the form of reports/statistics, books/edited books and policy documents.

Table 2: Type of document referenced

Report/Statistics		Book/Edited Book		Journal Article	Policy Document	
60.8%		**19.6%**		**3.9%**	**15.7%**	
OECD	41.9%	EU	40%	*American Economic Review*	GOV	62.5%
GOV	19.4%	NON-GOV	40%	*Economics Letters*	EU	37.5%
EU	16.1%	UNESCO	10%			
NON-GOV	12.9%	SCIE (Springer)	10%			
IEA	9.7%	GOV	0%			

Discussion

The bibliographic analysis of the education policy reforms in the Nordic countries (Picture 1) reveals a completely different trend from our findings on the current systemic and curricular reforms in Slovakia. In the Nordic countries most of the evidence produced is either national

in origin or from a national publication. On average the figure is around 72%. The nationally published evidence does of course include international evidence but tends to form part of a secondary analysis for national purposes. In our case the international evidence has been cited from international sources, and there is almost no secondary analysis. The exception in Component 7 of the Slovak recovery plan is two references to an analysis by the Education Policy Institute, which falls within the education ministry's remit, and one reference to extensive national research performed by an NGO (To dá rozum/Learning Makes Sense). Thus, the national evidence produced and adjusted for Slovak needs is marginal.

Picture 1: Distribution of references by location in selected Nordic countries

Country	Domestic	Regional	International
Denmark	60.17%	3.46%	36.36%
Finland	76.04%	1.63%	22.34%
Iceland	75.00%	2.08%	22.92%
Norway	66.83%	7.09%	26.08%
Sweden	79.80%	1.27%	18.93%
Total	71.94%	4.24%	23.82%

Note: $\chi^2 = 149.36$, $p < 0.001$

Source: Baek, Tiplic, and Santos (2022: 270)

Here we need to consider the institutional basis of the nationally produced evidence, which can be compared with the situation in Finland, often mentioned in Slovak discussions on education policy. The barren nature of the references is revealed when we look at how reforms are conducted in Finland and how the evidence underpinning the reforms is collected. Finland is also interesting because the bibliography covers the curricular reforms of 2014, which are similar to those taking place in Slovakia. But unlike in Slovakia, the Finns made great use of national evidence produced by agencies of the state and ministries. The reforms were therefore rooted in the work of these analytical units and, unlike in Slovakia, the reform discourse was "self-referential" (Volmari et al. 2022: 135). The references were not strictly of an academic nature, so in Finland, as in Slovakia, policy was not determined by peer-reviewed research published in academic journals. The key difference though is the analytical capacity at national level. Whilst state organisations and agencies dominate in Finland, the universities also play a crucial role. This can be seen in the domestic references, where the two most reputable Finnish universities – the University of Jyväskylä and the University of Helsinki – come immediately after the state publications (Volmari et al. 2022: 133). In the proposed Slovak reform documents there are no such references.

The two Finnish universities collaborate closely with the state, even to the extent of taking on some state responsibilities (international evaluations, cooperation with transnational organizations, especially the OECD). So, both universities provided "evaluation expertise" (p. 133), rather than academic expertise, for the curricular reforms and contributed

significantly to the creation of a national evidence corpus that was then used in the reform documents.

Concurrently, in the Nordic context, there is a notable presence of academic researchers within the ranks of advisory committees tasked with shaping and implementing education policies (Christensen and Hesstvedt 2019). Additionally, academics from universities frequently comprise the membership of policy delegations whose mandate is to oversee the implementation of evidence-based educational policies (Hansen and Rieper 2010).

In Slovakia, such links do not exist or do not have a systematised form that translates into a form of expertise. Not only do the state and ministries not provide evidence for reforms, but there is no link with universities that have the capacity to provide that type of "evaluative" or academic evidence. However, that does not necessarily mean such evidence does not exist; just that it is ignored by those involved in the reforms and the authors of the reform documents, often because the international evidence is seen as more authoritative and "global". Arguably this is especially true when the reform strategy is assessed abroad, by the European Commission for instance, as was the case with the Slovak recovery plan. In Finland, unlike in Slovakia, "we found no evidence of the transnational level overriding national expertise. In fact, the national players appeared to be a powerful filter between the global and local" (p. 139-140).

Conclusion

Our comparison of the way references are presented and used in policy documents to defend education reforms in Slovakia and Finland revealed some basic differences. Some of these were predictable based on European Commission (2017) data on the sources of evidence used in education policy, such as the lack of secondary evaluative analysis and weak links with research and university settings in Slovakia. Unlike in Finland, there is no official systematic production of evidence for education policy. And our analysis of the references confirmed that there was no relationship to the evidence published by Slovak universities or research institutes, whose status in education policymaking is quite different to that in Finland.

However, some of our findings were unexpected. In Slovakia "intersectoral commenting" [public consultation] is confined to the ministries and selected national stakeholders and social partners, so one would expect education policymaking to be isolated and closed. But, unlike in the Nordic education policymaking model, in Slovakia there seems to be a marked reliance on international evidence published elsewhere. The current systemic and curricular reforms in Slovakia are mainly grounded in foreign and international evidence that has not been adapted to the national context. Moreover, OECD and EU references make up almost half of all the references in Component 7 of the recovery plan. More than a quarter of the references are to evidence from standardised large-scale international assessments, especially PISA tests. This type of data is different from that found in peer-reviewed academic studies, which feature only marginally in the discourse on education reforms. The most common type of document was reports/statistics, which tells us something about the main and most dominant type of data in the documents – empirical data relating to international evaluations.

Hence there is a specific type of expertise, a sort of "evaluation expertise" based on "empirical evidence" (Volmari et al. 2022). But the way the data is used for policy purposes is also very different. In Slovakia the expertise relies on description and international data, whereas in Finland "the ability to select, interpret, and translate this kind of data so that they fit the national context is what gives specific national actors the authority to speak with the authority of an expert" (p. 139). That places the ball in the national court and the focus on the production of nationally focused data – including, for instance, secondary analyses of international data. That element is not to be found in the Slovak reform strategy.

The systemic and curricular reforms in Component 7 of Slovakia's recovery plan can therefore be considered a particular kind of quantification-based "numerocratic governmentality" (Angermuller and van Leeuwen 2019: 91), mainly from international tests and evaluations. Agreeing with Grek (2013) we can conclude that even in the education policy reform discourse in Slovakia expertocracy prevails, rooted in international comparative tests, mostly those run by the OECD. There is, however, a surprising degree of reliance on international evidence, particularly when compared with the Nordic context of education policy reforms.

Could this be a typical feature of post-socialist education policy, where the national infrastructure for creating national expertise has yet to be built? What role might the evidence produced at universities or research institutes play in this? Why is the policy sphere isolated from higher education and research institutes? How extensive is the network of actors involved in designing education policy reforms? These are just a few of the questions relating to post-socialist education policy that need to be answered. In Slovakia's case, though, one can argue that the way education policy is conceived of in the strategic document analysed does not reflect the way reform processes have evolved in selected Nordic countries. In fact, the situation is the opposite.

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Author

Ondrej Kaščák is a professor of education at the Faculty of Education of Trnava University in Trnava and the Faculty of Arts of Charles University in Prague. His research interests include the impact of educational policies and pedagogical initiatives on the lives of schools, pupils and their families. In this pursuit, issues of power relations in inducing educational change come to the fore. He chairs the Department of School Education and the editorial board of the *Journal of Pedagogy*.
Contact: ondrej.kascak@truni.sk

The Hollowing-out of the Public Sphere or Its Re-spatialisation? A Topological Probe in the Case of Expert Advice to the Education System

Jitka Wirthová

ABSTRACT This paper focuses on the modern technocratic idea of independent science advising the independent public and consequential criticism of the hollowing-out of the public sphere by expertocracy. Going beyond this misleading diagnosis, I focus on current places where the public sphere is produced using social topology and the notion of a sociotechnical imaginary that is publicly performed. Through an exploratory probe into a current facet of the ambiguous relationship between the public and expertise, I analysed the contexts, paths, and practices of a normative and expert document published annually by a Czech NGO to bring to the fore the difference between expertise as navigation to public debate, expertise as creating one's own public space, and expertise as a normative performance. All these forms of relationship between expertise and the public, in a way, transgress the modern sociotechnical imaginary of the direct effect of expert knowledge on public issues.

KEYWORDS expertise, public sphere, technocracy, audit culture, social topology, relational sociology, education

Introduction

> *Norms, including the epistemic norms that underpin all public knowledge, are constituted at the global scale through practices that are rarely exposed to critical scrutiny from citizens or social scientists.* (Jasanoff – The Practices of Objectivity)

The modern technocratic idea of scientific governance of society has received new impetus in current times, specifically in the demand that public issues ought to be solved by expert means. Despite the scepticism in sociology about the happy relationship between the public and science (Turner 2015), a modern ideal of expert advice to public affairs has been revived in worldwide calls for evidence-based public decision making (Ansell and Geyer 2017). The sociological question is what the current shift and role of this modern technocratic idea are and what its effects on the public sphere are. In this paper, this broad question will be answered only partially by a probe into one public debate about the education system in which claims of expert knowledge demonstrated such a shift.

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We know that specifically in the Central and Eastern European (CEE) region the totalitarian legacies had a negative influence on trust in both the "public sphere" and "objective expertise", unmasking both as illusions and suspecting misuse or dilettantism (Hirt 2012; Krastev 2017). Therefore, the relationship between science and the public is ambiguous and paradoxical in many dimensions in these countries. For example, despite this scepticism, people in post-communist countries in the CEE region have a much stronger preference for expert governance than people in Western European countries do (Bertsou and Pastorella 2017). And despite the criticism that expertocracy may be a danger to the public space (Bertsou and Caramani 2021; Turner 2015), many claims for "evidence-based" public decision making from all sides (the state and private and civil actors) gain more public space and are explicitly related to promises of modernisation, societal progress, and the public good. Evidence-based public decision making is deemed to be generic healing which should secure the deprived public space.

However, the sociology of expertocracy did not cover this contradiction between public and social scientific discourses and provide one-sided diagnoses of hollowing out the public sphere in the studies of the technocratic and expertocratic danger to democracy, often drawing on the critique of neoliberalism (Turner 2015: 17–41). Turner sees that the diagnoses of the public as a victim of experts or (and) (neo-) liberal ideologies masquerading as expertise are misleading and, moreover, dependent on the utopian character of knowledge. Although I draw on Turner's description, my findings depart from his liberal assertion that the public legitimises and can also delegitimise experts by its will. As I will show further, there is another utopian idea about the character of expertise – that it knows something. The probe will show that not always the factor is epistemic authority, but political legitimacy and visibility. Contrary to hollowing-out diagnoses, I will demonstrate a case of re-spatialisation of the public sphere when it is entered by expert advice, which also causes new exclusions. To do this, I will use social topology, which is a recent answer to the implicit ontological presupposition of space as fixed and inert to human action. Social topology views space as simultaneously being both produced by the actors and objects within it and productive of the actors and objects within it (Allen, 2016; Massey, 2005). This, in the case of the public, means sociological attention to its radical mobility (Sheller and Urry 2003), and in the case of expertise, sociological attention to the social positioning of experts as experts.

As Holmwood and Balon have suggested, "neo-liberal public policy has the effect of hollowing out the public sphere. This takes place in two ways. The first is by the direct privatisation of public bodies, the second by recommending that charitable bodies and NGOs be involved in the provision of services" (Holmwood and Balon 2018: 310–11). The problem for the authors is also the collaboration of NGOs with for-profit organisations and the political project of co-production of research that ties civil society organisations to government, which brought about "politically-based evidence" rather than evidence-based politics. This all deforms the public sphere and constitutes the context for the rise of populism (ibid). Although the case in this paper also evolved in a kind of politically-based evidence, it is one side of the problem, and I wish to introduce another: it is important to think not only about the intentional hollowing-out of the public sphere but also about travelling, the transfiguration

of the public sphere into another space-time, about topologies creating new relations between expertise and the public sphere.

This paper will use the case of the publishing of the "Audit" (Audit of the educational system in the Czech Republic: risks and opportunities). It is a strategic and expert document aimed at influencing decision makers in education and created annually by a Czech NGO, EDUin, from 2014 onwards, and from 2020 presented in the Senate of the Czech Republic (the Senate). This NGO is the only one that provides such "audits" and presents them as different than a position paper by an interested NGO. There are several significant organisations that run the main educational debates, but the main organisers are NGOs. The oldest one is SKAV (Permanent Conference of Associations in Education), founded in 2003; a younger one is EDUin (founded in 2010), and they are interconnected both personally and through their infrastructure. Together, they organise what are termed round tables (RT) devoted to various educational issues, the *Audits* among them. The *Audits* are products of EDUin, although SKAV, through various common personae, cooperates as well. The document encompassed the whole schooling system, not only describing weaknesses and opportunities (SWOT analysis) but also recommending the next steps. In that sense, it is a kind of descriptive expertise used normatively for public issues that are actually identified by that very expertise.

The fact that a civil society organisation orients its activities towards publishing an annual document called an "audit" almost 20 years after criticism of an "audit society" (Power 1997) begs closer examination. The NGO domain is no longer automatically linked with positive progressivism (Lavalette and Ferguson 2007) and from-below spontaneous movements (Müller 2007; Slačálek and Svobodová 2017). While these *Audits* seem to be the classic examples of audit culture, they evade such a neoliberal match since they play out topologically different relations among known elements such as modern state policy subjects and modern governance institutions. These *Audits* are not formally binding – they have no formal auditing nature. However, the documents present themselves as feedback from civil society to the state, experts, and the wider public. Publicising these documents simultaneously plays out different relations among expertise and the public. They contain knowledge from various databases, OECD's PISA testing, the Czech School Inspectorate (a national body formally responsible for the evaluation of schools' performance), or newly collected data. This assemblage of knowledge is created by the NGO "analysts" and commented on by "experts" who are from various jurisdictions, often combining several of them: private, academic, non-governmental, or formerly governmental advisors. As the findings will demonstrate, no geography we know from administrative maps is useful for capturing the space of these new public actors as they position themselves as normative decision makers about education next to or instead of the state. The rise of such intermediary actors brokering evidence has already been described (Lubienski, Scott, and DeBray 2011), but here the argument is put further to not only a different "information landscape" (Lubienski 2019: 70) but different relations between the public and expertise and hence a different agential space. This case can thus serve as a probe into one modality of the change in the relationship between the public and experts.

Studies from the field of the politics of expertise attuned to spatial issues (Jasanoff and Kim 2015) and social topology attuned to places of expertise and the public (Allen 2016; Massey 2005; Sheller and Urry 2003) provided me with the major conceptual toolbox for uncovering new relations and transfigurations of the public into new space-times where a modern individual gains a new position and is newly situated: a modern expert-self (trust partners) can operate as a public actor beyond modern institutions but simultaneously creates a public mass audience in the role either of spectators of public expert performances or of suspicious material to be controlled.

Where the public sphere is is, indeed, an empirical question. This paper first introduces social topology as a solution to the tension to which essentialist accounts of the public and the expertise evolved. Then the methodological section will describe the original data from the ethnography of public debates, semi-structured interviews, and the re-reading of data from previous research on strategic documents (Wirthová 2019, 2020). The empirical sections will proceed in the chronological manner of the *Audits*' career. In each phase in which the nature of the relation between the public and expertise evolved, I will focus on the production of actors, knowledge, and the public to demonstrate what a re-spatialisation of the public sphere, actors, and expertise may look like. Therefore, the argument in the discussion section is not partial or unsuccessful fulfilment of the modern relationship between the public and science by seemingly evidence-based public claims, but a topological re-spatialisation of the public space, together with public actors and public issues, and with the public as an audience. To allude to the citation at the beginning, not only are the *epistemic norms* not *exposed to critical scrutiny from citizens or social scientists*, but these epistemic norms become less and less relevant in the production of expertise used for political purposes. The aim of the paper is to demonstrate that although it was understandable why politically-based evidence evolved in the context of the Czech distrust of state institutions and in the general weakening of the state, it does not solve the problem of legitimacy or evidence. The topology of the current "Audit" NGOs does not provide better knowledge or a better public. Despite the representatives using some kinds of moral and expert discursive and spatial repertoires, the consequence is the division of people into a material to be known (audited) and "knowledgeable" actors who judge, which pushes the public sphere elsewhere.

Conceptualisation: Separateness of Territories and Spatial Turn

When thinking about the public sphere and expertise we have, for almost 200 years, presupposed two different realms of human activity – community making and knowledge making, famously depicted by Arendt as *vita activa* and *vita contemplativa* (Arendt 1998). Although we see them as independent and distinct, we are used to thinking about a connection between them. Through specific modern imaginaries, which have survived all postmodern attacks, citizens require public decision making to be wise as much as science and hence require and invite independent knowledge to help the independent public. This was depicted by Bauman in his allusion of the "happy marriage of state and science" in an era which preceded the "individualised society" of the late 1980s (Bauman 2001: 127).

Today it seems that this marriage is over. The attack by science and technology studies (STS) on this presupposed independence of the public and scientific realms is part of it. However, this paper does not wish to contribute to the rich literature on STS, but to offer a relational topological approach to the public sphere in order to gain a better understanding of the current shifts without the diagnosis of the hollowing out of the public sphere, which dominates current political studies, especially about the CEE context, as suggested in the introduction to the Special Issue. The relational topological approach I have adopted suggests that the change in the relationship between the public and expertise also means a change in both parties involved. From this there follows the shift in the sociological question from how the public sphere is distorted and hollowed out to the question of where it is now produced.

First, we need to deal with the tension that stems from the presupposed separateness and essentiality of the realms of public and knowledge, occasionally meeting each other but able to return to their previous solitudes (e.g., Collins 2015). This presupposition survived, surprisingly, all the post-foundational and anti-essential theoretical and political movements and is now reproduced on various levels of both scientific and public activities (e.g. in education; see Biesta 2007). This means two types of relationship between the public and expertise, presupposed as separate territories that compete in an exclusive way; they pose a danger to each other: a seemingly lost public sphere in favour of either scientification and technicalisation or the loss of expert knowledge in favour of the politicisation and ideologisation of knowledge. In all these types, both the public realm and expert realm are seen as losing their full territory – becoming lesser, narrower, ostracised, or colonised. These are all topographical notions of fixed territory (that is in danger), which presuppose that territory is in one place that is definable by universal metrics, while dynamism is something to be explained as a colonising expansion into a fixed space.

At least since 2000, this thinking has been the subject of critical objections from topological thinking, broadly and loosely called the *spatial turn* (Brenner and Elden 2009), which turns the question upside down – rather, dynamism is something normal, while stability should be explained (Abbott 2016; Sheller and Urry 2006). Authors use a number of examples from the global flows of financial engineering (Allen 2016), highway construction (Harvey 2012), and education (Saari 2012). The social topological approach stresses two connected spatial phenomena as crucial in the production and reproduction of social life: the possibility of objects being the same while the relations among their components change and that the very relationships under continuous transformation compose the very space of which they are a part (Allen 2016). This understanding enables us to focus sociologically on the ways in which actors adjust the proximity and distance among themselves and audiences and thus shape themselves and "others" and hence the space for action. While topography points to the stabilised measurement of insides and outsides, distance and proximity, topology does not view these metrics as taken for granted but scrutinises how any axes come about through social relations. In that sense, both expertise and the public sphere are objects in mutation, not replication, as they repeat in the time and space that are produced. Sociology can thus focus on these changed relations. However, this paper also focuses on stability, which is the enduring relationship between expertise and the public

sphere, albeit in different relations. Therefore, I follow the relational approach to the public sphere represented by Andrew Benjamin, the contemporary relational philosopher. For him, the public sphere is precisely the place where negotiation of the difference between what is public and what is private takes place (Benjamin 2015). This place of negotiation has no predetermined topography or formal jurisdiction; it can arise simply where the negotiation of the difference between the private and the public arises. Therefore, he dynamises the word "space" into the concept of "spacing" and shows that the creation of this space is not self-evident, that it is a certain performance. It is only as produced and acted that it can arise. In this, Benjamin goes even further than the argument about erosion and change in the already given public sphere (Sheller and Urry 2003).

However, such an approach needs to be operationalised. How can a sociologist recognise that such dynamic spacing of the public sphere is in play and what are the constitutive elements? To probe the current relationship between expertise and the public sphere, and the current practice of evidence-based public decision making, I need to combine topological thinking with concepts of performance and sociotechnical imaginaries. Sociotechnical imaginaries, as collectively held and performed visions, are an analytical tool to capture the relationship between the normativity of imagination and the materiality of agential networks (Jasanoff and Kim 2015: 19). It captures the presentation and modelling of the desired states of the future on the basis of scientific findings. Such models are attracting considerable reflection in critical policy studies as a kind of reiteration of the technocratic appeal of the modern age (Levinson, Sutton, and Winstead 2009; Popkewitz 2020). It enables us to approach the *Audits* as one possible materialisation of such imaginaries containing political, knowledge, and educational desires. But I am not focused only on the content of social, political, and expert imaginaries involved in these *Audits*, but also on the topological quality of its performance – on the properties of the public space that is played out by its publishing. As Allen adds, a performance of authority "is mutable and shifts in line with the ability of actors to make themselves more or less present in the here and now of spatial interaction" (Allen 2016: 29). The performance of some actors to make themselves more or less present in a public sphere through expertise is the site where what the current relationship between expertise and the public sphere may look like can be explored. The examination of the Czech case of the *Audits* publicised by an NGO performing various forms of the public will serve this purpose, albeit with a limited possibility of generalising the particular shape of such a relationship to the whole CEE region.

Data and Method

This paper is an exploratory study of a current facet of the ambiguous relationship between the public and expertise. It can serve as a lead to thinking about the current role of modern technocratic ideas in CEE and Czechia in the case of education, which is a social institution on which many of the promises of solving various societal problems are currently imposed (Depaepe and Smeyers 2008). The findings in the following passages are based on a case study of career of "Audit vzdělávacího systému v ČR: rizika a příležitosti (Audit of the education system in the Czech Republic: risks and opportunities).

This case study examined the following data:

1) a corpus of normative documents, press releases, and web invitations from its start in 2014 to the last Audit, *Audit* 2022; Audit 2023, publicised in February 2024, is not part of the analysis,
2) research observations of public events organised for launching *Audits*, such as personal observation at events or observation of recorded publicising of *Audits*, now mainly accessible on the EDUin YouTube channel,
3) 17 semi-structured in-depth interviews with actors presenting themselves publicly as experts on education: non-state (NGO), academia (ACAD), private (PRIV), and those holding several positions together (MIX) carried out during 2019-2020.

I approached this data as documents, as more than a text about some educational content (Prior 2008). As the *Audits* aim at *knowing expertly* what (not) to do with education in the future of society, they are both an artefact of a sociotechnical imaginary (in this case about education and society and about the role of experts and others) and a context of the production of the public sphere, since the documents' normative content is publicised under sociologically interesting circumstances.

In all of this data, I sought information about three possible contexts: open, closed, and refracted, which is a model suggested by the relational theoretical sociologist Iddo Tavory for analyses of qualitative interviews (Tavory 2020). For this paper, I also broaden it to other kinds of data (published documents and public debates). An open context can be interpreted as pertinent to 1) data and facts about situations in the past and present (the who, where, and when context), a closed context as pertinent to 2) situational information only about the event of interviewing or creating the document or happening of a debate context (various practices in situ & tempo), and a refracted context as pertinent to 3) a broader landscape of meaning, kinds of thinking, and imaginaries. In order to answer the question of where the public sphere may appear, I looked at the practices of securing positions to act in public in all of these contexts. I openly coded all the relevant segments presenting some relations between actors and space and subjects and objects using the MAXQDA program for qualitative analysis. I then focused on patterns in these relations, which led to the identification of phases in the public career of the *Audits* and the interpretation of the evolution of the public role of the *Audits* through publicising practices.

Audit as a Navigation of Public Debate

Seventeen years after the publication of Audit Society (Power 1997), a Czech NGO, EDUin, published its first "Audit". A 16-page PDF document was made public via EDUin website and accompanied by a press release, in which EDUin promised to publish *Audits* every year. This first Audit gained some media interest, but mainly through the network of the NGO's collaborators. The document described the strengths and weaknesses, opportunities and threats (so-called SWOT analysis) of the Czech education system in order (this year) to navigate discussion and decisions in education. However, labelling some activities as "audits" is not a neutral practice. It has constructive consequences for the auditees

(Power 2000), who are, in this case, all in the Czech schooling system. This would have decisive consequences for the construction of the public as the audience of the *Audits*.

As is evident from the interviews, the *Audits* were a response to despair experienced in relation to the condition of the state's rule over education. We must take into account two conditions. The first is the silence and chaos of Czech educational governance after 1989. E.g., there were four ministers in the year 2007, then each year one new minister,[1] This paved the way for the entrance of educational NGOs through which managerial effectiveness and comparative data become a public good.

> Actually, I realised that if there is no demand for some kind of change in that society, then it is clear that the education policy and education as such cannot be the priority of those politicians and it will always be such a poor little thing. And when I talked about it with various people around me, we came to the simple conclusion that there is actually a lack of an organization that would mediate the topic. (int08-2019-MIX)

The second is the specific nature of the Czech division between the political, public, and private realms. In the Czech context the political and the public do not map onto one another. The public is broader and involves more actors and issues that are deemed important for all. The political sphere is, contrary to some Western countries, delimited as a narrower sphere belonging to politicians (Dvořák and Wirthová 2023). Because of this it is reasonable that an NGO is criticising the state and politicians and is trying to influence them, but does not see itself as a political actor, which would be incomprehensible e.g. among German young people, where political engagement and public engagement map onto one another, since there what is public is political (Dvořák and Wirthová 2023). Depoliticisation has the opposite meaning in Czechia and Western countries. Therefore, the role of the *Audits* in producing a specific public sphere provides an important sociological probe of CEE.

From this beginning EDUin framed the *Audit* as a knowledge artefact based on proven facts to inform others. As a secondary analysis of data (often quantitative, comparative, transnational, provided by OECD-PISA, World Bank), it aimed at showing what (not) to do in the future. The press release accompanying the presentation of the Audits reads thus:

> One of the noticeable weaknesses of the Czech education system is the inability to say something substantial that is based on the analysis and understanding of the problem.[…] The Audit of the Education System, with the first edition of which EDUin wants to start the tradition of its annual publication, aims to describe the education system through its most characteristic features, recapitulate important events from the last year, and provide an overview of the steps that are essential for the development of education in the Czech Republic. (EDUin o.p.s., 2014b)

Its sociotechnical imaginary presents and models such a relation of expertise and the public as to secure an agential position as one among the actors of this future. As is evident from the interviews and the press releases, the organisation started from a general feeling

[1] The longest-serving minister was Robert Plaga (13. 12. 2017 – 17. 12. 2021), appointed by ANO, a populist party of which the figurehead is the billionaire businessman Andrej Babiš.

that politicians were not paying enough attention to public issues and expert knowledge, especially in relation to education. In the same press release it is stated:

> Opinions on what is happening in the field of education, what is important and what needs to be done, are often based on purely subjective assessments and randomly collected information. It is demonstrably harmful to Czech education. We would therefore like to provide navigation to similar considerations and decisions, independent of the interests of the key players. At the same time, we do not think that there are no other views on the matter; we expect and welcome discussion! (ibid)

This illustrates which presuppositions about the relation of knowledge to the public the author considers it important to publicise: what ought to be done must not be planned through subjective evaluations and disparate information. Better knowledge is provided in the *Audit*, which is presupposed to be independent. It is the SWOT analysis that can guide navigation in discussion and decisions. Since this discourse and the fact that the *Audit* was made public on openly accessible website means that the public sphere and discussion are somewhere outside the NGO and their *Audit* is presupposed to be reaching towards it. The separateness of territories is maintained in this phase; the *Audit* reproduces a version of the modern idea of a neatly divided plan to govern the educational system scientifically.

Interestingly, in this first document, there is a stance against naturally partial key players – this would change soon in subsequent *Audits* – key players would become partners, not rivals. Also, the agential positions in this Audit acknowledge the separateness of experts and the public.

> Why and how the Audit was created: EDUin perceives, in the context of the debate on education and education policy, that there is a lack of a simple, clear document in the Czech Republic that would map and name the state of the system in the most important points, recapitulate the major events of the past year, and indicate what it would be good to deal with in practical politics and professional debate next year. Therefore, EDUin, together with a circle of collaborators, decided to develop such a document, present it to the expert and media public, and establish a tradition of its regular publication. (EDUin o.p.s. 2014a:1)

In this very first year, we can see that the declared role of the authors of the *Audit* was not explicitly authoritative; instead, in a partner manner (*circle of collaborators)*, they wished to introduce their document to the expert and "media" public. This aligns with the narratives from the interviews, in which the actors stated that their aim was predominantly to inform the public and make education a wider public issue than had been the case in previous post-socialist times. Their entrance with the *Audit* was to break the silence of responsible state bodies. In that, they did not take any critical stance on the idea of auditing; on the contrary, they see control mechanisms as being needed in the Czech education system. But despite its name, it is not the product of any formal body conducting audits legally. The title means evaluation and judgement that stems from a non-governmental organisation towards the system as such, which becomes an auditee – material to be improved in terms of quality. This evaluative character is also the case of the content of this document (SWOT analysis).

However, this evaluative character has some consequences for possible members of the public sphere. Some become partners and some suspicious aspects of the failing

education system, e.g. teachers. In the *2014 Audit* one among three threats is: "Further degradation of teacher quality (thoughtless regulation instead of stimulation)". In this, teachers become not partners but things to be optimised, to be acted on to be better. In terms of its content, the *Audit* is a part of audit culture, but it is not any formal audit organisation; it transgresses modern technocratic topography since the state body formally responsible for evaluation is the Czech School Inspectorate, a directly managed organisation under the Ministry of Education. Since EDUin aims to present its A*udits* to influence not only the public debate but the whole education system, it has some serious consequences. The *Audits* produce the effect of separate realms of objects to be increased in quality (teachers, the education system) and experts taking rational care of them. Moreover, taking the relational topology seriously, the authors of the *Audit* are not approached as something pre-established (ready-made civic actors waiting for their part) – they can be understood as being produced, together with their audience, by the process of making this document public. The actors of the A*udits* are confirmed before the public; they are the effects of such publicising. An example of such confirmation was present in the public discussion section below the 2014 press release, which is now unfortunately inaccessible. Here, the resistance to being in the realm of material to be audited mixed with the explanation and confirmation of EDUin's right to create an Audit in terms of democracy and freedom of speech.

> Dear Eduin, I cannot without a doubt agree with the threat phrased as "Further degradation of teacher quality by thoughtless regulation of teaching instead of stimulation". HOW and by WHAT do you measure that degradation of teacher quality? (Not the quality of education, its conditions and results – but the teachers themselves!!!) Come and tell the teachers in the assembly rooms to their faces: your quality has decreased. (6th comment of 32, downloaded 17.3.2020)

> In its first beginning [Audit], there was primarily an effort to at least get education into the media and public discourse. I think it's going pretty well. The opinion on what we do and how we do it can, of course, be perceived differently. And we do not deprive anyone of the opportunity to join the discussion with a different point of view. (9th comment of 32, downloaded 17.3.2020)

Here, as a product of the publicising of an Audit, the negotiation of the roles of actors appeared – those who confirmed the role of the Audit as an important knowledge artefact together with its authors, and those who resisted the division into the knowledgeable actors who judge and a material to be known (audited). In the following phases, the confirmation of the *Auditors* increased.

Audit as Its Own Public Space

In the year 2015, EDUin published a new *Audit* (25 pages) and applied a kind of external examination or peer review in which they asked for commentaries from various public actors in education and published their comments in the very same document. A press release, "Audit of the education system for the second time, with expert opposition", introduced this important change:

> The Czech education system has its own specifics that determine its condition, problems, opportunities, and risks of further development. […] However, as these are often very complex topics, on which there are different opinions and for which different solutions are proposed, we approached experts dealing with education policy from different points of view and asked them for their comments and opposition. Their comments can be found in the footnotes to the individual points of the Audit, or at the end of each of the three chapters. (EDUin o.p.s. 2015:1)

However, this differed in several features from both a standard scientific peer review and formal policy consultations. The choice of the commentators was made internally without public debate, not according to legitimised knowledge or formal responsibilities (all the relevant ministries and offices). It was a public document but not completely so. The names of the commentators were disclosed for the demonstration of authority through known expert names more than for proper scientific evaluation and reworking of the argument.

> The group of opponents is made up of academics, representatives of the political scene, mostly former and other politicians or high-ranking officials in the field of education management, and representatives of business, who we know are interested in the topic. So that the external examination as, let's say, has multiple angles, it's really an effort to validate it. Without that, it can be labelled as some sort of fable of a non-profit organisation that has no legitimacy. In this way, we are able to point out that there is agreement on some things, and there isn't agreement on others (int11-2019-NGO)

Performing this process and working with only selected partners make it hard to align the production of this *Audit* with scientific advice on public issues – as such, the *Audit* transgresses modern ideals of both science production and public sphere production. Topologically, the authors and authorities of the *Audits* reached some legitimatory sources from realms of which they did not want to be part. For example, in the 2018 and 2019 *Audits*, they explicitly distanced themselves from science.

> It is not a strictly scientific study, as the range of variables that must be taken into account complicates both the methodology and the use of resources. (EDUin o.p.s. 2019a:1, 2020:3)

But this non-science is based on measuring, setting goals, and control:

> Recommendation: It is not enough to write good intentions on paper. It is necessary to make an evidence-based educational policy and to be able to measure whether the set goals are being achieved. (EDUin o.p.s. 2019b)

Topologically, science as a form of knowing is distanced as the necessary condition for rational public debate. Expertise does not need to be a science but can have the same authority. In this phase, the expertise moved from the position of being merely a knowledge tool to being the essence of rationality as such. As is evident from the year 2017, the authors of the document wished to fill the loss of rationality concerning public affairs.

> Why audit the education system? Experts in the field of education agree that the education policy in the Czech Republic has been non-conceptual for a long time. Random and thoughtless interventions in the education system, the effects of which we are not able to predict or subsequently

> evaluate, increase the volatility and limit the possible potential of the education system. This is a serious problem in a period of expected rapid changes in technologies, which immediately cause economic and generally social metamorphic processes. (EDUin o.p.s. 2018a)

> The annual Audit of the educational system in the Czech Republic aims to provide such insight in a form that respects the evaluation of experts and is also comprehensible to the media and the general public. (ibid)

These citations illustrate the general shift in position from the moderate introduction of a document to the public (the first Audit) to an authoritative (rational) expert agreement made "comprehensible to the media and the general public". What is also interesting is the position of the media – being made the main audience before the "broad public" in the document. This shift in audience, orientation to the media, and visibility is a backdrop against which this paper understands the re-spatialisation of the public in the given case.

As is evident from the interviews, self-expertisation seemed to solve the problem of the destabilised position of NGOs in a society sceptical about any "public actors". An *Audit*, as public feedback to state power, should provide an expert mirror. The authors viewed themselves as both civil society and experts filling in the hollowed-out public space that was abandoned during communism while aiming at the ideal of "partnership" between expertise and the public. But from the beginning, there has been tension about whether others are partners or (non-rational) enemies. The publishing of additional infographics and other simpler materials that accompanied the main analysis was illustrative of this ambiguous (dis-)respect for others. This also affected the performance of the public space. These "Infographics" and "Summary of the most important findings with a reduced contextual component" are designed to provide easy points to agree with the conclusions of the *Audits*. With the presupposition of less competent (or busier) readers and orientation to the media, there also come more self-aware plans for the role of such *Audits* – they are no longer about merely informing and developing debate, but about state planning and implementation.

> After several years of gradually shaping and updating the Audit, we have managed to create really robust analytical material that describes the education system in important detail and offers evaluations and solutions. We firmly believe that it will be used in the planning and implementation of education policy in the Czech Republic and will draw attention to really serious topics, some of which require immediate action. (EDUin o.p.s, 2018b)

It faces us with an important question of the role of knowledge in public debates, in this case education. The willingness to publicise simplified knowledge slogans, the stress on the media, and the greater stress on the NGO's expert authority all suggest a rather weaker role of the epistemic quality of expert knowledge and a stronger role of expertise's persuasive quality aiming at direct influence.

It also points to a rather different form of expert control of a public issue (in this case education) than is imagined by technocracy or expertocracy, in which the epistemic quality of expertise is decisive – the scientific, objective quality itself should govern what to do; modern sociotechnical imaginaries count on knowledge as a power by its epistemic quality. However, as Nico Stehr argued, knowledge has no direct relation to power. It is

the action – the work which is done with this knowledge – that determines which power relations evolve (Stehr and Adolf 2018). On the basis of the case study, I would push this interpretation further. For Stehr et al., despite the decisive role of work with knowledge, experts are still ones who have some better knowledge than others (objective, indisputable, etc.). However, in my case, it is not the quality of knowledge but the refracted quality which sticks to the bearer of such knowledge, which gives the authority and the power to influence public debates. The expert has authority because he/she delivers "expert" knowledge – self-labelling performed in front of the public is the practice that sets the relationship between expertise and the public sphere. In such a relationship, it is not presupposed that "key players" invited to pay attention to the *Audits* will read long analyses of audits; they watch infographics telling them the story of who is an expert, who fails (the state, politicians, teachers, etc.), and who is important (key players). In the given political and social circumstances under which the NGO had to act this public performance transgresses the modern technocratic visions of influential knowledge. In that sense, expertise as a pure epistemic quality is made too distant to influence immediately the public sphere. On the contrary, expertise as label practice mediated through simpler message containers (infographics) is pushed to the fore in order to be visible to the public. The idea of independent science advising the independent public sphere is not maintained in this phase. Expertise is made felt present only through normative and political claims of those who need to stabilise their public position.

Media coverage also increased in this period; in addition to the EDUin website itself, *Audits* were introduced, described, or advertised in internet educational portals or on the websites of educational journals, such as pedagogicke.info, ceskaskola.cz, ucitelske-listy.cz (teachers' letters), and rizeniskoly.cz (school management), but also in media with broad coverage such as Hospodářské noviny (a financial newspaper) and ČT24 (Czech public television).

Despite its explicit stress on rationality, it is not rationality that is contained in the many analyses in the *Audits*, but rationality as refracted through the authors – experts – their meaning is now "those who create and bring rational knowledge"; and as we will see in the next phase, such rationality can also refract through those who follow these *Audits*. This shift to direct influence instead of energy-consuming and not-so-influential "contributing to public debate" will be even more visible in the next phase, in which the *Audits* went to be publicised in the Senate.

Audits as Normative Events

The 2019 *Audit* is important for several points: for the next change in the materiality of the *Audit* itself, the message it brought, and the structure of ownership of the NGO that published it, which made EDUin more of a professional advocacy group than, as previously, a bottom-up volunteer group.

The format of the *Audits* remained more or less the same across the years 2015-2018; it was a PDF document accompanied by other PDF infographics and summaries. But in 2019, it moved to hypertext, which it is not possible to read linearly; one must "wander" according to a given structure of references. There was also a change in the ownership structure

of the NGO that publishes the *Audits*. In December 2019, EDUin signed an agreement on cooperation and financial support for the next five years from 2020 with Livesport, which is a Czech technology company that develops websites and applications with fast sports news. In January 2020, Livesport became a general partner of EDUin and takes one-third of the positions on the administrative and supervisory boards. At the same time, this company alternates in the position of the founders of EDUin (EDUin o.p.s. 2019c). According to simple word content analysis, it is apparent that this document deals the most of all the *Audits* with the terms "public", "expert", and "independence". Without overinterpreting, it partly covers the restructuring of the power structure inside EDUin. The press release stated that "We are an organisation independent of the state and we need strong donors to finance our programmes and projects" (EDUin o.p.s. 2019d).

This first hypertexted document claims to bring "more rationality"[2] based on available evidence to the discussion about education policy. Its ambition was to "bring more important actors to the conclusions" of this document, such as "political representatives, legal decision-makers, business actors, academics and experts, to school directors and teachers" (EDUin o.p.s. 2020). This means rather a passive role for the public audience – the conclusions are already prepared and even "more important actors" are not partners in formulating them, while they can demonstrate rational action simply by following these conclusions. Nevertheless, the document explicitly stated that it is not a rigorous scientific study (also in the previous *Audit*). Despite this, the authors still called their analyses involved in the document expertise. In order to "raise the objectivity" of its document, the NGO addressed many "experts and insiders in the field of education" – "independent opponents", whose comments the authors tried to incorporate into the document. (EDUin o.p.s. 2020).

To fully understand this facet of expertise meeting the public, we need to take into consideration the way this *Audit* was publicised and its very specific circumstances (COVID). It was the first case of presentation of this document not before the general public but in the Senate. In this event, not only was there a "publication" of the document in play, but also a shift from an educational audience to a decision maker audience, and the shift in the form of the public sphere. A wider context must be noted. Since the beginning of the pandemic, speed and physical distance had been required from all responsible actors in Czech education when creating normative plans for what to do in an exceptional state of affairs. This same pressure also pushed NGOs in education; they emphasised more online channels, which also entailed some narrowing– i.e. less publicly chosen panellists in "public" debates or an audience whose participation was narrowed down to writing questions using the chat functions of the media that were used. It seemed logical that publicising the *Audit* went online – but there was something more involved. These technologised practices go against our traditional view of what the public sphere is. Although it seems to be more public (as a part of technological optimism because "everyone can see it"), the actual publicness of the public is brought into question for several reasons: evading the formal public structures (the public space), the non-public choice of panellists, and the privately-based technological materiality (social media).

[2] More rationality is already claimed in the 2018 Audit.

Let us have a closer look at this shift in the materiality and publicness. The first pandemic *Audit* (2020) was presented in February 2021 in the Senate's empty auditorium with only the senator hosting the NGO, a representative from the Ministry of Education, a moderator from the NGO, one presenter from the NGO, and there were two other presenters from the NGO online (EDUin o.p.s., 2021). The presentation was broadcast via Facebook and YouTube. The general audience was allowed to pose some questions in the chat rooms of these social media. Various layers of publicity, materiality, and virtuality make up this performance. This performance situated various elements in a complex way that escapes neat theories of the public sphere – just where the public sphere is makes this performance hard to answer.

First, it was a normative event documenting claims of what should and should not be done. Second, since it was broadcast on social media (FB), anyone could see it – the audience was public and general. However, the event inside was just a presentation between the NGO's representative and a decision maker; the space inside was devoid of a public audience. Nevertheless, the space outside was indefinable (no one could determine who would watch in a given time) but not empty. However, since the communication between the presenters and the audience was distanced, they were only a spectator audience, viewers, although public. They could pose a question in the chat but they were not a partner in the dialogue between those two on the stage.

One of these chat questions was symptomatic: *"Who ordered this Audit?"* (YouTube chat 5th comment, accessed 10.11.2023, now unfortunately erased). Who ordered this audit is truly a question – nobody. EDUin did not create it to order but for its own purposes or for the good of education. Authority as a formal notion of who orders is distorted in this performance. The authority here is not of who orders, but who has the right to sit next to the senator and let others watch him say what should be done. Such a performance of authority may bear ambiguous meanings. The explicit message provided by EDUin is different from the meaning for the senator and for the audience mediated narrowly through private social media. Some of them could challenge such authority in terms of formal rules of particular administrative settings. The title "audit" does not confuse only social scientists, but also people used to legal language. But these different meanings are not any clashes between pre-established registers of power (here are senators and their interests, here are experts and their interests, here is a civic organisation and its interests) simply because these roles are actually mixed; in this performative act, the turfs of responsibilities, administrative roles, and fixed territories of influence are problematised: the senator invites an expert who is actually not a scientist to present the *Audit* which is actually not an audit to an audience which is not actually in discussion. An NGO expert arrogates some of the senator's authority to himself when using his institutional space, and the senator arrogates the proclaimed rationality to himself by sharing the space with an expert. Audit is the name of the evaluation – the audience is to watch a judgement which was not actually ordered by anybody. The separateness of territories is not maintained in this phase again. From a topological point of view, iterations of such public events as publicising these *Audits* are acts of mutation, not of replication, although they repeat in time and space.

Third, another feature of the publicness of this performance is the non-public nature of the technological carrier of this normative documentation. But, as in the case of expertise, digital technologies do not have the power to influence the public sphere without human action that works with or through them. What is interesting here is that in the next *Audits* (for the years 2021 and 2022), this format of publicising the *Audit* remained almost the same, even though COVID had ended. It was an event in the Senate, with more audience attendance, broadcast by Facebook providing moderated chatting facilities.

In these Senate performances, the NGO, even more, directed its communication to policymakers from state structures. The performance of publicising an *Audit* is delivering a message as the text itself, though in a different manner. This public performance is a practice to fix the meaning of who is an expert, what it means to be an audience, and what planning for education is; simply put, it sets the meaning of the relationship between (a kind of) expertise and a (kind of) public sphere. Setting these meanings has much more to do with the legitimacy of speaking publicly than with expert knowledge as an epistemic quality of knowing something. This means that the case is not that the public is abandoned, left empty, but it is located somewhere else – where the negotiation of the difference between what is public and what is private takes place – on the margins of these performances – when someone contests the meaning and the roles of auditors (judges) and auditees (material to be acted on) performed on the stage.

Production of Actors, Knowledge (Expertise), and of the Public Sphere

This section will provide a more synthetic interpretation of the effects on the public sphere. Since it is based on a limited case study, it acknowledges that in other spheres than education it may be otherwise. The roles of the *Audits* in all their contexts are threefold. They are a position artefact; the authority of an NGO is signalled by a normative document, "our expert document". Secondly, they are a key node of interaction, an infrastructuring and stabilising connectivity among important actors (the variety of external commentators, panellists, other networked partners), ideas, and values. Thirdly, they are sociotechnical imaginaries desired to be followed (it is rational to follow an *Audit's* conclusions, since non-partisan experts worked on them). They translate its politics of influence into morals of rationality by delimiting reasonable and valuable things to strive for and, in that, delimiting the role of a reasonable public audience.

1) In the above-described case, the role of expertise in the public has the relational dynamics of expertis*ing*, especially an "expert self", and de-expertising of other actors, hence of others' actions and knowledge. The consequence is that knowledge was not conveyed through knowledge itself but through the self-creating of a knowledgeable actor. Using expertise became legitimising action, not "evidence-based" epistemic action. It became less a case of knowing how to do things, and more of a position maker, how to be an agent bringing a change to a public issue. This relationship was maintained further by a kind of elevation by expertise, which pushes the position of the bearer of an *Audit* above the mere public (equal among others). The *Audits*' relation to reality goes beyond its cognitive role because it plays the role of a legitimation artefact. Expertise became a valuable object which was used for

political purposes. The displacement of the epistemological quality of the expertise from its public use is the recontextualisation of the modern imaginary in new functions. In that, Nico Stehr is right; knowledge is not powerful in itself but in its use (Stehr and Adolf 2018:25). However, the findings show that knowledge is not used as a knowing tool but as a "relevant actor" tool, which delimits the roles of others: the specific content of quantitative large-scale comparative data, in its use, brings quantified relations to others – quantitative comparison of others – enclosing them into a mass of numbers against ME, who has the reason and will to take care of THEM. In that sense, knowledge has power – it divides between knowledgeable, unquantifiable experts as unique personalities and others as countable matter.

2) The attitudes of distrust towards the state inherited from the communist era from the side of civil society applied at the beginning of the given NGO, and also in the challenging context of the pandemic and its aftermath. Nevertheless, the use of normative documents as devices for legitimising their own "expert" position, as well as to identify "true educational problem", the NGO actors went beyond this distrust. They put the emphasis on direct communication with policymakers, which I have described as an emerging new legitimation infrastructure in Czech education and as the misunderstanding caused when critiques of both neoliberalism or state-driven transnationalism are applied (Wirthová 2022). Contrary to Holmwood and Balon's findings (2018), the shift in the role of NGOs was not caused by the desire to be accepted by the neoliberal government but by a desire to be accepted as a relevant partner in the face of people's distrust of all public institutions – state or non-state. Therefore, Czech NGOs in education needed both to be "against" the government to capitalise on the distrust of it and to be a "partner" of it.

The public audience was not something ready-made, which is or is not invited to debate, but which is created by that debate – it was a situational and processual matter. Given the probe, the public sphere is divided into those who are experts and those who are the subject of their actions. Material or the system, acted on in order for its quality to be improved, ceased to be a partner and thus the public in the sense of equals who can oppose claims. They became spectators of the public performances. The public audience of the *Audits* has changed its place and space (re-spatialised) because the public use of expertise through such documents and its presentations and performances was also re-spatialised. This is not to claim that the Czech educational situation faces NGO-isation, a thesis which has already been revised (Jacobsson and Saxonberg 2013). The case is not that an NGO is more interested in fundraising than mobilising society – but that through the contexts of their publicising, the Audits as specific documents created a different type of agential and ideational space with regard to education.

3) The probe has shown that the modern technocratic idea of a marriage of expertise and the public sphere can survive in the legitimation practice of non-state actors, whose positions are fragile from an administrative point of view. They secure their positions through expertise performed before the public, a topological practice through which both the nature of expertise and the form of the public sphere mutate. The public is changing because the space-time of public debates is changing. Although the modern connection of the public and expert knowledge is still living in the sociotechnical imaginary, it has consequences that go beyond modern stabilities. One of the consequences is the rising separation of the experts'

topological space-time (cross-jurisdictional space for action) and topographic space-time (measurable, systemic) for those who are the objects of their auditing. Expert actors can break free from the modern space and structure their relationships without traditional modern dependencies and responsibilities. Since the material (auditees) cannot be a partner to experts, it becomes the audience in the sense of spectators. The public sphere can then arise situationally and relationally on the margins of public performance where such separateness is contested, in the places of the contestation and deliberation of the legitimacy of actors and their knowledge – often on the margins of performances, sometimes as a non-intentional consequence. Looking back on the analysis, the public sphere is a situation that must be performed, but not all performances of publicness are public in effect.

Conclusion

This paper presented the relationship between expertise and the public sphere as a social topological research question demonstrated by exploratory study of contemporary reform endeavours in education, namely the expert and public documents of an NGO: *Audit of the educational system in the Czech Republic: risks and opportunities*. The paper identified forms of the relationship between expertise and the public that transgressed the modern sociotechnical imaginary of the direct effect of expert knowledge on public issues. I stressed the mediatory role of the self-labelling of actors as experts (expertising) that set the expert individual as independent of the state and science and made the epistemic character of expertise less important than that of legitimation. It also put others in the position of material to be improved. In doing this, relationally, through its performative character, it also established different public spheres. I argue that an important way to examine the contemporary public sphere is not to see it as emptied, but as relocated. Such a division between material and individual to handle this material is modern in principle, but in this case, it is not made by science nor by the state but by "public" actors who developed a different, not-so-modern topography, rather a topology, with different coordinates and tools of influence shifting the meaning and the place of the public sphere and hence not hollowing it out but displacing and shifting it. On the one hand, the public sphere shifted to being a mere audience of the Audits, and on the other, the public sphere was happening on the margins of publicity, on the sites where the division was deliberated and sometimes resisted or criticised. This latter meaning and place of the public sphere were situational, and in Benjamin's terms, it was spacing, where the actors resisted the object-subject divide and claimed a common partner relationship. Not taking into account this possibility of relocation could cause the social sciences to look for things where they are not and in a form they have lost. It is important to think not only about the intentional emptying of the public sphere but also about travelling and transforming the public sphere into another space-time, creating new infrastructures that can (while retaining some modern elements for some) be un-public for others.

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Author

Jitka Wirthová is an assistant professor at the Institute of Sociological Studies, Charles University, Prague. She focuses on contemporary changes in the social space of normative agency and the theoretical concepts that capture it. In her research, she scrutinises various initiatives aiming at societal change, ranging from educational, technological, to expert, and policy solutionisms.

Contact: jitka.wirthova@fsv.cuni.cz

REVIEWS

Magdaléna Hruška

David Kašpar: *Co dokáže kultura?*

Praha: Meziměsto. 2024. 128 s.
ISBN 978-80-909320-0-5

Koncem roku 2024 vydalo nakladatelství Meziměsto knihu *Co dokáže kultura?*, jejímž autorem je kulturní manažer, stratég i politik David Kašpar. Toto malé nezávislé nakladatelství literární dokumentaristky Michaely Hečkové se tak po letech vrátilo k tématu místních kulturních iniciativ a jejich vlivu na proměny měst, které bylo středem pozornosti už v první knize *O městech a lidech* z roku 2017. Kašpar si klade ještě ambiciózněji cíl: poukázat na kulturu nejen jako na tvůrce identity a komunitního života, ale i na kulturu jako na klíčový motor ekonomického a sociálního rozvoje. Kašpar využívá metody sociálních věd a věnuje se v humanitních i sociálních vědách málo studovanému tématu kultury. Proto je dobré a důležité knihu kriticky představit.

David Kašpar napsal čtivý, entuziasticky laděný „manifest pro lidi, kteří chtějí způsobit změnu" (jak sám autor uvedl v rozhovoru s Janem Gerychem pro *Archspace*, vychází toto označení z reakcí čtenářů, kteří knihu tímto způsobem vnímají), protkaný inspirativními příběhy nejen z ČR, ale i zahraničí. Nebrání se zde ani obnažení vlastního selhání, které využívá k formulaci obecných principů učení se z chyb. Kašpar prezentuje publikaci jako „výstup z dlouhodobého akčního výzkumu na dané téma", tedy metodologického přístupu běžně využívaného v sociálních vědách k porozumění sociálním procesům v jejich přirozeném prostředí a čase. Práce však vykazuje určité metodologické limity, zejména v oblasti sebereflexe autorovy vlastní výzkumnické pozice. Tento nedostatek s sebou nese riziko potvrzování předem formulovaných předpokladů prostřednictvím selektivně interpretovaných dat. Ačkoli autor do textu zařazuje i některé externí zdroje, například výsledky dotazníkového šetření agentury STEM z roku 2023 zaměřeného na kulturní chování obyvatel hl. m. Prahy, příliš se nezabývá jejich hlubší analýzou či kontextualizací.

Publikace je členěná do devíti kapitol, přičemž každá reflektuje jeden z přívlastků kultury (např. kulturní veřejný prostor, kulturní instituce) nebo jejího propojení s dalšími oblastmi, jako například kultura a sousedství, kultura a kreativita. Teoreticky se proces „působení změny skrze kulturu" pokouší v poslední kapitole zachytit konceptem efektu kulturní spirály. Text doprovází střídmé abstraktní ilustrace Martina Svobody, fotografie z archivu autora a mapy dokreslující, o čem je řeč. V recenzi se zaměřím na Kašparovo pojetí kultury, resp. kulturní participace a strategického plánování rozvoje měst na přístupu bottom-up.

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Kultura, na které se všichni neustále a přímo podílíme

V pozadí publikace stojí pojetí kultury v její nejširší možné podobě. Podle Kašpara se „za kulturou nechodí, kultura se žije v každodenním okamžiku“ (Kašpar a Gerych 2024). Přistupuje k ní jako k všeprostupujícímu prvku společenského ekosystému, přičemž přebírá a rozvíjí antropologické a sociální perspektivy. Ztotožňuje se s definicí urbanistky Lii Ghilardiové, pro kterou je kultura vším tím, co antropolog Ulf Hannerz nazývá „významy, které lidé vytvářejí a které lidi formují jako členy společnosti“ (cit. in: Kašpar 2024: 21). Vedle toho vnímá umění – často mylně ztotožňované s celou kulturou – jako její specifickou součást, jako „excelentní tvůrčí výkony jednotlivců nebo skupin v různých činnostech“ (Kašpar 2024: 21). Kašpar se zabývá tématem skutečně dostupné kultury. Vysvětluje důležitost přístupu oproštěného od paternalismu a rozvíjí úvahy o dostupnosti kultury, zejména v kontextu vztahu mezi centrem a periferií, stejně jako o strategiích práce s publikem. Nutno dodat, že označení „práce s publikem“ sám Kašpar neužívá, ale v knize jej lakonicky opisuje jako přístup, kdy se kulturní organizace zbavují překážek, které kladou svým návštěvníkům do cesty a od návštěvy (potažmo participaci na kultuře) je odrazují.

Podle Kašpara jsou pro kulturu klíčové aktivní kulturní účast a angažovaný přístup. Ostatně v kontextu (samo)správy měst zpochybňuje striktní dělení obyvatel na pasivní uživatele městského prostoru a jeho správce a navrhuje nové pojetí role občanů ve městě – nikoliv jen jako konzumentů služeb, ale jako spolutvůrců městského prostředí. Kašparovo pojetí kultury tak souvisí s pojetím odkazované perspektivy Kultura 3.0, kterou popsal profesor ekonomie kultury, expert na kulturní politiku a územní rozvoj založený na kultuře Pier Luigi Sacco. Východiskem této perspektivy, které Sacco formuloval v dokumentu zabývajícím se vývojem role kultury v ekonomice a ve kterém navrhuje nový přístup pro programování strukturálních fondů EU v období 2014–2020 (Sacco 2011), má být aktivní kulturní participace, kterou „rozumíme situaci, kdy se jednotlivci neomezují pouze na pasivní přijímání kulturních podnětů, ale jsou motivováni k tomu, aby využívali své dovednosti: tedy nejen poslouchali hudbu, ale sami ji hráli; nejen četli texty, ale také je psali, a podobně“ (Sacco 2011: 9).

Florida bez kritické reflexe

Za triviální považuji pasáž vřazenou pod kapitolu s názvem *Kultura a kreativita* (Kašpar 2024: 66–68), ve které se Kašpar odkazuje na bestseller Richarda Floridy *The Rise of the Creative Class*. Floridovy myšlenky nesporně poskytly nový pohled na městský rozvoj, nelze však odmyslet, že již od svého představení v roce 2002 Floridova teorie „kreativní třídy“ čelí silné kritice, ať už s ohledem na metodologické nedostatky,[1] nebo proto, že opomíjí rizika gentrifikace a sociální nerovnosti, které mohou vzniknout v důsledku jednostranného zaměření na kreativní třídu. V českém prostředí shrnuli výhrady k této teorii Jan Kalenda a Tomáš Karger ve své stati „*Kreativní třída“ v kritické optice Bourdieuho teorie*, kde

[1] Například Jamie Peck tvrdí, že Floridova teorie postrádá jasný kauzální mechanismus a trpí kruhovou logikou. WIKIPEDIA contributors. 2025. „Creative class.“ *Wikipedia, The Free Encyclopedia*, 4. března 2025. Cit. 4. března 2025 (https://en.wikipedia.org/wiki/Creative_class).

upozorňují na neprůkaznost některých závěrů a zaměňování příčin a následků. Dále poukazují na nejasnou definici samotné kreativní třídy a na to, že příběh kreativní třídy může být zčásti příběhem politické mobilizace aktérů, kteří mají spadat do této třídy (Kalenda a Karger 2011: 11).

Je překvapivé, že se Kašpar rozhodl sáhnout po tomto snadno dostupném konceptu, aniž by kriticky reflektoval Floridova doporučení pro urbanistické plánování, jejichž aplikace vykazuje prokazatelné nedostatky. Tím zároveň neprojevil znalost komplexnějších přístupů, které zohledňují širší spektrum faktorů ovlivňujících městský rozvoj a snaží se minimalizovat negativní dopady na sociální soudržnost. Inkluzivnější, evropsky orientovaný a více participativní model nabízí například koncept kreativního města (Creative City) Charlese Landryho nebo koncept Creative Placemaking. Oba vycházejí ze společného myšlenkového základu – zkoumají roli kreativity v rozvoji měst a zdůrazňují kulturní a komunitní dimenzi urbanismu, společenskou inovaci, participaci a kvalitu městského prostředí. Landryho model kreativního města představuje dlouhodobou strategii městského plánování, která se zaměřuje na změnu celého ekosystému města (inovace, podnikání, kulturní politika, vzdělávání), a je zaměřený na systémovou změnu, zatímco Creative Placemaking má často menší měřítko – zaměřuje se na konkrétní místa ve městě (parky, náměstí, budovy) a jejich oživení prostřednictvím kulturních aktivit, spíše dočasné nebo experimentální projekty.

Na rozdíl od Floridy, který se primárně soustředí na ekonomický dopad kreativity, tyto přístupy kladou důraz na udržitelnost a sociální inkluzi. O tom, že si Kašpar uvědomuje, co obnáší a jaká rizika reálně představuje dobře míněná vize budoucnosti kultury, přesvědčuje v nadcházející kapitole o kulturním plánování (Kašpar 2024: 81–93), ve které srozumitelně postihuje i aspekty, které Florida ignoruje.

Radosti a strasti kulturního plánování

Kniha podtrhuje význam strategického plánování rozvoje měst, jehož katalyzátorem má být kultura a na němž se participativně podílí občané dané lokality nebo území. Přičemž koordinace a komunikace, respektive trojice: sdílet – dialog – naslouchat, zde představují klíčové faktory. To koresponduje s Kašparovou vizí podporovat decentralizované, spontánní iniciativy vycházející od samotných aktérů a systematicky zvyšovat dostupnost kultury. Zdůrazňuje význam bottom-up přístupu, který prostupuje celým textem. V závěru na výše zmíněném konceptu efektu kulturní spirály demonstruje, že rozhodujícím momentem spouštějícím změny – jeho slovy: impulzem, který může iniciovat ozdravný proces (Kašpar 2024: 112) – může být téměř jakýkoliv kulturně-umělecký projev, jako například divadelní inscenace, veřejný happening, urbánní intervence, komunitní festival a podobně. Ty následně vytváří nové a další synergie a akcelerují onu spirálu efektů kultury. Daný přístup koresponduje s tím, co Boltanski popisuje jako „projektovou obec“.

Ojedinělý pohled na kulturní politiku v českém prostředí

Témata, kterými se Kašpar v publikaci zabývá, dosud nebyla v odborné veřejnosti rozsáhle a systematicky diskutována. Žádná z dosud česky vydaných publikací nepostihuje tuto problematiku tak komplexně a především s jasnou ambicí „otevřít oči" čtenářům.

V češtině sice vyšlo několik knih, které se věnují dílčím tématům z Kašparovy publikace, avšak žádná z nich nenabízí tak ucelený pohled podložený vlastními zkušenostmi a praxí. Přínosný vhled do zkušeností zástupců regionálních kulturních neziskových organizací přináší sborník *Autor motor animátor* (Durdilová et al. 2008). Dílčí témata, jako je práce s publikem nebo (lokální) kulturní politika, reflektují publikace vydané nakladatelstvím Institutu umění – Divadelního ústavu mezi lety 2009 a 2016. Patří mezi ně například *Re:Publikum – Možnosti spolupráce s publikem ve 21. století* nebo tituly z ediční řady Kultura & Arts management. Právě v tomto nakladatelství vyšla v roce 2013 podruhé v rozšířeném vydání kniha Martina Cikánka *Kreativní průmysly – příležitost pro novou ekonomiku*. Ta má ke Kašparovu pojetí nejblíže svým důrazem na nutnost „přehodnocení" dosavadního chápání ekonomie kultury. Rozměr lokální kulturní činnosti rozkrývá rovněž publikace *Kartografie (Eko)systémů / RurArtMap* (Mácha et al. 2022), která vyšla v roce 2022 jako součást stejnojmenného projektu zaměřeného na mapování a posilování regionálních kulturních iniciativ, jejich environmentální a sociální zaměření a vliv na místní komunity.

Další příklad transdisciplinárního výzkumu, který propojuje teatrologii se sociálními vědami, představuje disertační práce Petra Kodenka Kubaly *Pokušení romantické soudržnosti: rutina a revoluce v experimentálním divadle* (MUNI, 2021), která je výjimečná tím, že se věnuje v humanitních i sociálních vědách stále málo reflektovanému tématu: jak se kolektivní umělecká tvorba odehrává „zevnitř". Autor zkoumá každodennost a dynamiku divadelních kolektivů a usiluje o rekonstrukci toho, jak aktéři sami chápou svou praxi, pozice a vztahy, místo aby je rámoval předem danými kategoriemi.

Kašparova publikace *Co dokáže kultura?* nabízí jedinečnou perspektivu insidera, který zároveň v reálném čase disponuje mocí „něco změnit". Kariéra Davida Kašpara sleduje pozoruhodnou trajektorii taženou touto ambicí. Od angažovaného aktivisty se postupně vypracoval přes pozici ředitele příspěvkové organizace a komunálního politika až k roli vlivného decision-makera: měsíc po vydání této knihy byl jmenován náměstkem ministra kultury ČR. Kašparovy zkušenosti a situace popsané v knize doplňují a šířeji ilustrují výzkumné pole, do něhož spadají koncepty jako kulturní kapitál, kulturní zprostředkovatelé nebo kulturní vkus a spotřeba, tematizované například v publikaci *Pravidla vkusu: jak se společnost rozhoduje, co je v kultuře hodnotné* od Marie Heřmanové, Michala Lehečky a kol. Právě praktické zaměření recenzované knihy by mohlo být pro některé sociální vědce přínosné propojováním teoretických poznatků s reálnými aplikacemi.

Navzdory výše uvedeným teoreticko-metodologickým limitům je publikace cenným impulsem k tomu, aby se kultura stala vážnějším předmětem zájmu i v rámci sociálních věd – a to jak v rovině témat, tak výzkumných přístupů. Pokud současné tendence – viz například dotazníkové šetření STEM či publikace *Pravidla vkusu* – naznačují rostoucí zájem o kulturu jako významný společenský fenomén, Kašparův prakticky ukotvený text lze chápat jako součást tohoto dobrého trendu, který si zaslouží další kultivaci i kritickou reflexi.

Recenzovaná kniha nesporně přináší ojedinělý pohled na kulturní politiku v českém prostředí a mohla by být relevantní i pro sociální vědce: kulturu pojímá v nejširší možné podobě, reflektuje propojení kultury s různými oblastmi, jako je veřejný prostor, instituce, sousedství a kreativita, teoreticky se pokouší zachytit proces „působení změny skrze kulturu" konceptem efektu kulturní spirály a vnáší podnět k diskusi o správě městské kultury a roli občanů. Kašpar zároveň tematizuje aktivní kulturní účast a angažovaný přístup, což je klíčové téma pro sociologické studie participace, občanské společnosti a komunitního rozvoje.

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Ondřej Hejnal

Marek Jakoubek: *Antropologie a etnicita: fakta, mýty a kognice. O etnicitě pro mírně pokročilé*

Brno: Centrum pro studium demokracie a kultury. 2024. 117 s.
ISBN 978-80-7325-594-7

Kniha *Antropologie a etnicita: fakta, mýty a kognice* od Marka Jakoubka se věnuje problematice etnicity způsobem, který čtenářům nabízí kritický pohled na etablované teorie a paradigmatické směry v tomto oboru. Především se zaměřuje na slavnou publikaci *Ethnic Groups and Boundaries* editovanou Fredrikem Barthem, jejíž význam a vliv Jakoubek podrobuje systematické analýze a revizi. Na rozdíl od tradičních studií etnicity se autor nevyhýbá otevřenému přehodnocení obecných pohledů a názoru, že Barthova práce, resp. Předmluva ke zmíněnému sborníku, zcela zásadně změnila antropologii. V tomto díle nám Jakoubek předkládá otázky, zda Barthovy myšlenky a přístupy byly v roce vydání tak revoluční, jak se o nich často píše, nebo zda nebyly tyto přístupy a koncepty dobře známé již před vydáním Barthem editovaného sborníku. Tato kniha je proto cenným přínosem pro všechny, kdo se zajímají o kritické přehodnocení zažitých paradigmat ve společenských vědách.

V první kapitole Jakoubek přehodnocuje Barthův přínos pro oblast studia etnicity, přičemž sleduje historický vývoj konceptu etnicity v antropologii i v širším společenskovědním diskurzu. Kniha *Ethnic Groups and Boundaries* je často chápána jako klíčová, zakládající práce, která poprvé definovala pojem etnických skupin jako entit s jasně definovanými hranicemi. Jakoubek však dokládá, že tento přístup nebyl nijak inovativní – řada jeho základních teoretických myšlenek byla dostupná již v předchozích studiích, na které Barth sám neodkazuje. Kapitola se dále zabývá tím, jak Barthova práce s postupem času získala prestiž a vyústila ve všeobecně přijímaný konsenzus, který glorifikuje jeho práci jako začátek moderního studia etnicity.

Druhá kapitola přináší pohled na důvody Barthovy popularity, které Jakoubek vidí v souladu Barthova modelu s kognitivními mechanismy lidského vnímání. Autor zde navazuje na koncept „groupismu“ (skupinismu), jak jej definoval Rogers Brubaker. Tento termín vyjadřuje lidskou tendenci kategorizovat sociální prostředí do zřetelně oddělených skupin. Podle Jakoubka se Barthova práce stala významnou nikoliv proto, že by přinášela nové teorie nebo koncepty, ale protože koncept hranic etnických skupin, jak jej Barth prezentuje, zapadá do základních kognitivních mechanismů, a tedy intuitivně souzní s myšlením čtenářů. Tato kapitola, kombinující antropologii s evoluční psychologií a kognitivní vědou, dodává knize interdisciplinární hloubku a inovativní perspektivu. Jakoubek zde originálním způsobem

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spojuje kognitivní a kulturní antropologii a ukazuje, že Barthovy teze byly široce přijímány díky tomu, jak dobře rezonovaly se základními lidskými kognitivními vzorci.

Ve třetí kapitole Jakoubek zkoumá, jakým způsobem je Barthovo dílo používáno v akademickém prostředí. Zjišťuje, že se citace „Barth 1969" často objevuje jako pouhý formální odkaz, aniž by byla podložena reálným rozborem či přímým vztahem k argumentaci daného textu. Jakoubek tvrdí, že Barthova práce se stala jakýmsi „prázdným signifikantem", který má legitimizační funkci, aniž by nutně vedl k prohloubení debaty o etnicitě. Toto opakované a téměř „rituální" odkazování na Barthovu Předmluvu odhaluje zajímavý aspekt akademického diskurzu, kde se některá díla stávají nepostradatelnými spíše díky své historické prestiži než skutečnému vlivu na aktuální výzkum. Jakoubek tak na několika příkladech ukazuje, že Barthova práce dnes slouží spíše k ritualizovanému potvrzení akademické odbornosti než jako základ skutečné analýzy a teoretického přínosu v diskusích o etnické identitě. Tímto vhledem do akademického prostředí tak kniha přispívá k metodologické reflexi v oblasti epistemologie společenských věd.

Čtvrtá kapitola představuje překvapivý a velmi zajímavý obrat, když Jakoubek zveřejňuje dříve nepublikovanou kapitolu Axela Sommerfelta, věnovanou mezietnickým vztahům v západní Ugandě, která se do konečné verze Barthova sborníku nedostala. Jakoubek tuto kapitolu překládá a analyzuje, což čtenáři nabízí unikátní pohled na kulturní a etnografické posuny, jež Sommerfeltova studie reflektuje. Tato kapitola se zaměřuje na klíčové posuny v pojetí „kmenů" a etnických skupin. Sommerfeltova práce podtrhuje dynamiku mezietnických vztahů a zdůrazňuje posun od konceptu kmenů ke konceptu etnických skupin, který se v té době odehrával. Tento historický pohled obohacuje čtenáře o širší kontext, ve kterém Barthovo dílo vzniklo, a vybízí k zamyšlení, jak by Barthova kniha mohla vypadat, kdyby Sommerfeltova kapitola byla do původního vydání zařazena.

Jakoubkova kniha je důkladně zpracovaným a fundovaným dílem, které přináší novou perspektivu v pohledu na Barthovu slavnou Předmluvu a na studium etnicity jako takové. Autor se neváhá pustit do kritiky a přináší přesvědčivé argumenty, podporované bohatou historickou analýzou a přehledem literatury. Propojuje sociokulturní antropologii s kognitivní antropologií, což knize dodává jedinečnou hloubku a umožňuje, aby Barthův přínos byl zkoumán nejen z pohledu sociální vědy, ale také z hlediska lidských kognitivních tendencí. Mezi silné stránky patří také originalita a odvaha, s níž Jakoubek vyzývá akademický svět k přehodnocení přijetí Barthovy práce. Navíc díky Sommerfeltově nepublikované kapitole kniha nabízí také vzácný vhled do tehdejšího antropologického diskurzu a přináší čtenáři i originální materiály, které podtrhují hlubší myšlenkové proudy v etnografických studiích druhé poloviny 20. století. Kniha může sloužit jako cenný zdroj pro studenty a badatele, kteří chtějí nahlédnout za tradiční teoretická schémata.

Antropologie a etnicita: fakta, mýty a kognice Marka Jakoubka je důležitým příspěvkem k diskusi o etnicitě nejen v českém prostředí, ale i v širším kontextu antropologie. Jakoubek se zde projevuje jako přesvědčivý kritik, který přináší nové pohledy na klasická díla antropologické literatury a nebojí se klást (staro)nové otázky. Kniha dokáže oslovit jak studenty, tak odborníky, kteří se zabývají antropologickými studiemi etnicity a chtějí se dozvědět více o kritickém přístupu k zažitým paradigmatům. Vzhledem k dosavadní Jakoubkově publikační činnosti je překvapivé, jakou interpretační váhu a sílu přikládá Brubakerovu „groupismu",

resp. kognitivní antropologii a evolučním výkladovým schématům, které dříve podroboval často nelítostné kritice. Tato paradigmatická či epistemologická reorientace není v knize nijak komentována. Na potvrzení (či vyvrácení) této tendence si tedy budeme muset počkat do vydání další Jakoubkovy (ne-vojvodovské) publikace.

Alexandra Vrhel

Ashley Shew: *Against Technoableism: Rethinking Who Needs Improvement*

New York: WW Norton & Company. 2023. 160 p.
ISBN: 978-1324036661

Against Technoableism: Rethinking Who Needs Improvement is a provocative and enlightening book written by Ashley Shew, a disability studies and Science and Technology Studies (STS) scholar. She focuses on technologies designed for disabled individuals and introduces the concept of "technoableism". Through this lens, Shew argues that many celebrated disability technologies, which ostensibly aim to serve disabled people and improve their lives, actually perpetuate persistent ableism. This ableism is reinforced and reproduced through "salvation narratives" that frame technological innovation as a means to "fix" or eliminate disability.

Shew critiques the "normalizing" objectives of disability technologies, which often define disability as an individual medical impairment or a technological challenge rather than a systemic societal issue. She contends that many existing disability technologies prioritize the comfort of able-bodied and able-minded individuals over the actual needs of disabled people. Furthermore, the voices of disabled individuals are frequently ignored in the design and evaluation processes of these technologies. This is why Shew consciously and reflexively supports her arguments with blog posts from disability advocates rather than relying on academic books or articles by so-called "experts." By prioritizing lived experiences and grassroots perspectives, she challenges the dominant narratives that often exclude disabled voices. The book provides a thorough analysis of the current character and trajectory of disability technologies, placing them in historical and cultural contexts while also imagining a more inclusive and equitable future for disability and related technologies.

Chapter 1, "Disabled Everything," serves as an introductory chapter in which Ashley Shew distinguishes her account from the familiar disability stories often presented in mainstream media and culture. These are narratives curated to meet non-disabled needs and expectations, such as "inspiration stories" or "feel-good news". As Shew states, "[t]his book is about the stories that disabled people tell that nondisabled people usually aren't interested in" (Shew, 2023, p. 8). Shew critiques mainstream narratives that portray disability technologies as miraculous, life-changing solutions to the "problem" of disability. She challenges the simplistic and stereotypical "disability-as-problem" and "technology-as-solution" rhetoric. Instead, she shifts focus to the everyday experiences of living as a disabled person within systems and institutions that are, at best, unprepared for disabled

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individuals and, at worst, overtly ableist. From this critique, Shew develops the concept of "technoableism" as a pervasive form of ableism. This framework underscores how able-bodiedness and able-mindedness are equated with human worth, often through the lens of labour potential and productivity. Within this logic, technology is positioned as a tool to "restore" worth to lives deemed "unworthy" due to disability.

In Chapter 2, titled "Disorientation," Ashley Shew contrasts the familiar narratives of disability presented in mainstream media with the lived realities of being disabled. Most disability stories we encounter are curated to align with non-disabled needs and expectations, often highlighting exceptionality and life-changing moments of inspiration. In contrast, there is little interest in authentic disability stories that include complications, complexities, and ordinariness. These authentic accounts are commonly shared within disabled communities, where the focus is on disabled lives themselves rather than the celebration of disability technologies. The chapter's concept of "disorientation" introduces a classical distinction between the medical and social models of disability. Through this framework, Shew explores the historical and cultural interconnectedness of disability, labour, and human worth. She shifts the focus from viewing disability as an individual medical impairment to recognizing it as a political identity.

Chapter 3 explores the "Scripts and Crips," where Shew lists a typology of the most stereotypical tropes about disabled people that we meet in media and cinematography; these are pitiable freaks, moochers and fakers, bitter cripples, shameful sinners, and inspirational overcomers. While describing these tropes, she deconstructs and argues against the stereotypes they propagate and also warns about negative real-life consequences these stories have on disabled people and their ability to self-advocate and be properly heard.

Chapter 4, titled "New Legs, Old Tricks," continues Ashley Shew's critical examination of media narratives about disability, focusing specifically on stories about prosthetic technologies. These technologies are often portrayed as miraculous and celebrated as shining examples of technological innovation. However, Shew highlights that many of these innovations remain inaccessible to the majority of the amputee population due to their high cost and limited insurance coverage. In these narratives, the technology often takes on a more active, agential role than the disabled person, who is reduced to a passive recipient of technological "salvation". Stories of amputee athletes, while inspiring in their own right, represent only a small fraction of the amputee population. Shew argues that this oversimplification and tokenism is harmful because it perpetuates ableist assumptions that frame disability as a matter of character or "attitude" and impose a societal expectation to "overcome" disability on an individual level.

Chapter 5 addresses the topic of "Neurodivergent Resistance," where Ashley Shew highlights the role of the neurodiversity movement within the wider disability movement. Shew explains that having multiple disabilities – whether physical, mental, or both – is actually typical among disabled people. Therefore, cross-disability communication is essential for envisioning and creating better futures for the disabled. In alignment with the social model of disability, Shew redefines impairments associated with conditions like autism or ADHD as stemming from disabling environments rather than individual pathologies. These diagnoses are often described behaviourally, as behaviours that disturb or discomfort neurotypical

individuals, with little to no attention paid to the subjective experiences of neurodivergent people. Shew critiques the "treatment" approaches for neurodivergence, such as the infamous Applied Behaviour Analysis (ABA), which focuses strictly on behaviour modification while ignoring the internal emotional lives of neurodivergent people. Despite evidence that ABA often causes trauma and severe mental health issues, the voices of autistic adult survivors of ABA remain marginalized. Instead, the needs and perspectives of parents and neurotypical experts are prioritized.

Finally, Chapter 6 concludes the book with the topic of "Accessible Futures," where Ashley Shew argues that the future is disabled. She asserts that, despite the ongoing technological revolution, we should anticipate more disability in the future, not less. This projection is not presented as a dystopian vision but as a realistic prediction based on societal trends such as climate change, population aging, and the likelihood of future pandemics. Shew also highlights the potential contributions of disabled people to space travel, arguing that many disabilities may make individuals better suited for life in space than the ableist ideal perpetuated by space travel agencies. Her tone remains optimistic, emphasizing that more disability does not necessarily equate to a lower quality of life. Instead, she advocates for embracing disability as a natural and normal aspect of human existence that must be considered when designing new technologies, environments, and services. Ultimately, Shew underscores that the inclusion of disability and disabled people is in everyone's interest, fostering a more equitable and sustainable future for all.

The book has many strengths, both in form and content. In terms of form, the text is written in informal, accessible language, and Shew's ironic tone makes the book highly engaging. This inclusive style broadens the book's reach to a wide variety of audiences, including scholars, students, policymakers, and the general public. Additionally, the book is structured with disabled audiences in mind. Its six chapters can be read independently as standalone essays, allowing readers to engage with specific topics without needing to read the entire book to grasp the main arguments.

In terms of content, one must value the unapologetically insider position that gives voice to the disabled community, whose perspectives are often dismissed – especially in the context of disability technology discourse. Shew prioritizes authentic disabled stories that revolt against scripts preferred by non-disabled audiences, who often crave to be inspired or moved by tales of disability. A variety of disability stories are presented, with an emphasis on intersectionality as a decisive factor in the realities of disabled lives. In contrast to many other disability studies accounts, which emphasize physical, visible disabilities, Shew incorporates perspectives on mental disabilities and neurodivergence. Through this inclusion, she articulates the need for the disability movement to be as inclusive as possible, supporting cross-disability conversations and fostering cross-disability communities.

The text is rich with information, as every argument is supported by a variety of examples and illustrations drawn directly from the insider reality of navigating ableist social systems and institutions as a disabled person. Shew reveals the complex practical realities of accessibility, waiting lists, poor insurance coverage, and the complications connected to disability technologies that lie behind the facade of disability technology advertisements or emotionally moving news stories. Moreover, Shew also utilises the logic of "technoableism"

as a framework for critically examining other phenomena, discourses and spheres defined by discrimination, offering a fresh angle on established debates, and inspires the imagination of alternative approaches and solutions.

Temporality is an aspect that is exercised exceptionally well in this book. The book captures the contemporary state of disability technologies, trends, and debates while simultaneously illuminating time-old, perpetual themes. The analysis and deconstruction of current issues with a wide cross-disability reach are built upon a deep understanding of the historical context from which today's discourse arises and disability technologies materialize. Shew pays a lot of attention to the past, mainly the parts society often wants to forget, such as eugenic policies applied to disabled bodies. She connects these to our current narratives of disability and disability technologies and warns us that both Pokémon Go and gas chambers can be framed as disability technologies. This deep awareness of the past and present of disability technologies then informs the imagination about their future directions and possible outcomes of current trends. Shew articulates warnings but also makes concrete recommendations for better disabled futures stemming from her first-hand experience and shows that feasible solutions begin with listening to disabled people themselves and not the wishful, idealistic thinking of non-disabled experts, designers, and engineers. Shew manages to tie together the past, present, and future of disability and disability technologies into a comprehensive narrative that is neither utopic nor dystopic but realistic, yet sobering and inspirational at the same time.

It is difficult to pinpoint weaknesses in this book because of its distinctive and unique character. Some might critique the sarcastic tone, but this tone actually enhances its persuasiveness and immersiveness. In fact, it becomes a strength, as it radiates inclusiveness not only through its content but also through its form. The structure of the book, with its six chapters designed to be read independently, aligns with this aim, as noted by the author. However, the absence of a traditional introduction and conclusion may leave readers longing for a summary of the main arguments or a stronger sense of connectivity between the chapters.

When it comes to content weaknesses, there is truly little to critique in this skilfully-crafted and information-rich text. Any criticism might stem more from a desire to delve deeper into certain themes. While it is entirely understandable that a single book cannot address everything and that the author's intent dictates which topics are explored and to what extent, I would have appreciated more discussion on the role of capitalism in shaping the development and use of disability technologies, and their application to disabled bodies and minds. Additionally, it would have been fascinating to see Shew's perspective on the concept of the cyborg and the process of humanity's cyborgization – especially in considering where, if at all, the utopian cyborg of sci-fi imaginaries intersects with the reality of today's disabled cyborgs.

This book, a hybrid of autoethnography, culturally-critical essay, and manifesto, exemplifies excellence in disability studies through its form, content, and style. Its eclectic character and unconventionality, which might attract criticism from traditional academic perspectives, are in fact its greatest strengths. By being accessible to a wide audience, it holds the potential to have a meaningful impact on both theory and social reality. This is further

supported by its unapologetic authenticity. I sincerely hope that this book serves as a catalyst for creating more space for disabled voices in discussions about disability technology. There are already authors and works as valuable as this one, but they often lack the platforms necessary to amplify their resonance.

References

Shew, Ashley. 2023. *Against Technoableism: Rethinking Who Needs Improvement*. New York: WW Norton & Company.

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Praktický průvodce přípravou prezentací a projevů

Petr Holík, Petr Sucháček, Ingrid Procházková,
Hana Tesák Vrtala

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Máte skvělou myšlenku – ale jak ji sdělit tak, abyste zapůsobili? Slova mají moc měnit svět. Ať už prezentujete na konferenci, obhajujete diplomovou práci nebo chcete oslovit širokou veřejnost, **narazili jste na správného průvodce!**

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