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Original Articles

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Transition from work to retirement: theoretical models and factors of adaptation

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Abstract:

The article aims to provide a review of the currently most accepted models explaining transition and adjustment to retirement, which include role theory, continuity theory, life course perspective, and the resource-based dynamic model for retirement adjustment. One of the main theories explaining adaptation to retirement is *role theory*. This theory assumes that during the transition from one life period to another, an individual exits one role and enters a different role (George, 1993). Based on this theory, retirement can be characterized as a role transition (Riley & Riley, 1994), when a job role is weakened or even lost, and roles associated with family and community are strengthened (Barnes-Farrell, 2003). In cases when an individual's job role is central to their identity and they are overly-engaged in their job, transition to retirement is more difficult compared to an individual who perceived their job role as more stressful, more demanding or who had experienced more conflicts with their co-workers. Transition to retirement, thus, can be experienced as a relief, where there is an opportunity to engage in family and community roles in newly-acquired leisure time (Osborne, 2012; Wang, Henkens, & Solinge, 2011a). Unlike the emphasis on role change, the *continuity theory* argues that retirees adapt effectively to a new life-period if they have developed relationships, activities, a framework of thinking, and adaptive skills during their previous life-period and if they continue to use them after being retired, and thereby they maintain continuity (Atchley, 1989). Research suggests that an individual can maintain continuity even through part-time employment (Feldman & Beehr, 2001) or by maintaining leisure activities (Pushkar et al., 2011) after retiring. Continuity theory, therefore, suggests that a retired person is directly responsible for creating an adaptation strategy which may help them in their transition. *Life course perspective theory*, on the other hand, discusses two main factors influencing retirement: a) individual history - including past life transitions, working and recreational habits (Carr & Kail 2013), and b) individual attributes - such as demographics, health and financial status and transition capabilities (Griffin & Hesketh 2008; Wang, 2007). From a life course perspective, an individual who has flexibly addressed previous life transitions, who has been less socially integrated with their job and co-workers, and who has attributes effective for retirement adaptation, will experience a smooth transition to retirement (van Solinge & Henkens 2008; Wang & Shultz, 2010; Wang, et al., 2011a). A current model explaining the adaptation to retirement is the *resource-based dynamic model for retirement adjustment*, which recognizes adaptation as a process that depends on individual resources and changes of these resources (Wang et al., 2011a). The resources can be defined as the overall ability of an individual to meet their needs and are divided into seven categories: a) physical resources, including health or physical strength (Jex, Wang, & Zarubin, 2007); b) cognitive resources, including, for example, work memory (Wang & Chen 2006); c) financial resources, such as wage and retirement benefits (Hobfoll, 2002); d) social resources, e.g. social networking and social support (Kim & Feldman, 2000); e) emotional resources, such as emotional stability, sensitivity, mood (Wang, Liao, Zhan, & Shi, 2011b) and f) motivational resources, e.g. self-efficacy. Adaptation to retirement is a direct consequence of an individual's access to resources. If people have more resources to meet their retirement needs, transition and adaptation to retirement will be less demanding than for people who do not have enough resources (Topa & Valero, 2017; Wang, 2007). Based on the review of

these theoretical models, it can be said that an adaptation of an individual depends on the importance he or she attributed to their job role (George, 1993; Osborne, 2012), whether they were able to maintain continuity in their activities, patterns of thoughts or relationships (Atchley, 1989; Pushkar et al., 2011), how well they coped with previous transit events (van Solinge & Henkens 2008), and whether they have sufficient resources, in social, financial or health areas (Wang et al., 2011a).

During recent years, researchers and practitioners have been interested in understanding the factors which affect the transition from work to retirement. With the aim of a complex review of these factors, we have been inspired by the categorization of Wang and Schulz (2010), which was later edited in other articles (Wang et al., 2011; Wang & Hesketh, 2012). Factors in different areas (individual attributions; factors related to work before retirement; variables related to family; factors of transition to retirement, and activities after retiring) have been described and analyzed in terms of their positive or negative affect on retirement.

Individual attributions with the positive effect on retirement adjustment have been identified as: good physical and mental health (e.g. Zhan et al., 2009; Silver et al., 2016), financial status, financial goals and literacy (e.g. Lusardi & Mitchell, 2011; Noone et al., 2009; Pinguart & Schindler, 2007), as well as health-related behavior (Jex et al., 2007; Topa & Varenò, 2017). Factors related to work before retirement with a positive effect on retirement adjustment have been identified as job stress, job demands and challenges (e.g. van Solinge & Henkens, 2008; van den Bogaard et al., 2016), as well as dissatisfaction at work and unemployment before retirement (Marshall et al., 2001; Pinguart & Schindler, 2007), since all of these factors contribute to experiencing relief from previously demanding job, and thereby to a better adjustment. Equally important are the factors related to family, such as marital status (Lee, 2016; Pinguart & Schindler, 2007), the quality of marriage (Szinovacz & Davey, 2004; Wang, 2007), and work status of a partner (Moen, Kim, & Hofmeister, 2001; Wang, 2007). It has been shown that the quality of adjustment also depends on the variables related to transition, whether the retirement was voluntary (Reitzes & Mutran, 2004; van Solinge, Henkens, 2007, 2008) and whether a retiree planned how they were going to spend their retirement (e.g. Hershey et al., 2007; Steffens et al., 2016). Moreover, research has shown that it is important for a retiree to stay active and engage in various activities, whether it is a paid job (e.g. Zhan et al., 2009; Quinn, 2010), voluntary work (Dorfman & Douglas, 2005; Griffin & Hesketh, 2008) or free-time activities (e.g. Silver et al., 2016).

Factors identified with a negative effect on transition to retirement were: health problems (Kim & Moen, 2002; Wang, 2007), identity of a work role (Reitzes & Mutran, 2004), physical job demands (Pinguart, & Schindler, 2007), number of dependent children and financial claims associated with care-giving (Kim & Feldman, 2000; Marshall et al., 2001), loss of a partner during the transition to retirement (van Solinge & Henkens, 2008) and involuntary early retirement (e.g. Dorn & Sousa-Poza, 2010; Heybroek et al., 2015).

A higher awareness of positive and risk factors of adaptation on retirement may be beneficial to helping professionals as well as to seniors themselves in their transition from work to retirement. It may be therefore recommended that retirement training programs should focus on individual research-based factors with a positive effect on adaptation; such as retirement planning, engagement in free-time activities or voluntary work. Based on the identification of risk factors for adaptation to retirement, working psychologists or various organizations, such as clubs for retirees, could focus on mitigating the negative consequences of these factors. Although it is impossible to prevent some risk factors, such as loss of a partner, it is possible to develop supportive relationships in clubs of seniors, and also to facilitate learning effective coping-strategies as part of various preventive programs.

Keywords:

Retirement. Retiree. Factors of adaptation. Transition.

Introduction

The transition from work to retirement is a fundamental part of the life cycle in an individual's life. Based on the current demographic situation and prognosis, there is a significant increase in the share of seniors in the population. According to the latest statistics from August 2018, 1,063,943 people are in receipt of pensions in Slovakia. In view of this number, we consider the topic of retirement to be very current, and we believe it is also necessary to address this issue from a psychological point of view.

There are various definitions regarding retirement, mostly based on different research questions and the disciplinary background of the researcher (Denton & Spencer, 2009). Definitions of retirement in the scientific literature are based on at least eight different *criteria*. Those criteria are: an absence of labor force participation; a reduction in either working hours or in earnings; income earned to be low or below a specified threshold; receiving a pension income; loss of

connection with the main employer; change of career or employment later in life; self-assessed as being retired; or a combination of these criteria (Denton & Spencer, 2009). Weiss (2005) distinguishes three approaches to defining retirement: economical (a person becomes a retiree when they stop receiving a wage), psychological (a person becomes a retiree when they perceive themselves as a retiree), and a sociological one (a person becomes a retiree when others perceive them as a retiree). With respect to the psychological focus of our article, we adapt the definitions of retirement from a psychological perspective as “an individual’s exit from the workforce, which accompanies decreased psychological commitment to and behavioral withdrawal from work“ (Wang & Shi, 2014) and as „a process through which retirees get used to the changed aspects of life that result from the work-retirement transition and seek to achieve psychological comfort with their retirement life“ (Van Solinge & Henkens, 2008). We consider these definitions of retirement as appropriate for this article since they define retirement as a psychological process, but also as a life status (Wang & Shi, 2014).

In the past, the retirement was perceived as a period of crisis that had a negative impact on the well-being of the senior (van Solinge & Henkens, 2008). Špatenková (2004) also perceives retirement as a developmental crisis. This crisis is an inevitable and integral part of life and brings changes that can, but do not necessarily have to be, negative. In addition to changes, an individual has to take on new roles and tasks, create new ways of coping with different situations which tend to be accompanied by emotional tensions. Therefore, the interest of researchers in recent years is, above all, to recognize the factors related to the adaptation to retirement (van Solinge, 2013).

Among the best-known approaches that explain retirement and are at the same time scientifically approved are: *role theory*, *continuity theory*, *life course perspective theory* and the *resource-based dynamic model for retirement adjustment*. The aim of this study is to conceptualize transition to retirement by describing and analyzing these approaches, as well as providing an overview of the most important factors that have a positive or negative impact on adjustment to retirement.

The goal of this study is to provide a systematic review of the retirement models and theories, especially with regard to the factors influencing the transition to retirement. The literature search was done in the following databases: Web of Science, EBSCO Host (PsychInfo, Psychology and Behavioral Sciences Collection, ERIC), and Google scholar. The criteria for searching used the following key words: transition to retirement; retirement; retirement models; retirement theories; retirement + factors; the full text in both English and Slovak languages. After excluding duplicate citations, full-texts were read. For the literature review, we have used 57 journal articles, four chapters from edited books, two books, and one unpublished doctoral dissertation.

Theoretical models and theories regarding the transition and adjustment to retirement

Role theory is one of the most accepted theories explaining the adaptation to retirement. This theory assumes that during the transition from one life stage to another, individuals end some roles and eventually enter different roles (George, 1993). Based on this theory, retirement can be characterized as a role transition (Riley & Riley, 1994), when a job role is weakened or even lost and roles associated with family and community are strengthened (Barnes-Farrell, 2003). In cases when an individual’s job role is central to their identity and they are overly-engaged in their job, transition to retirement becomes more difficult (Ebaugh, in George, 1993) compared to an individual who perceived their job role as more stressful, more demanding or who had experienced more conflicts with their co-workers. Transition to retirement, thus, can be experienced as a relief, where there is an opportunity to engage in family and community roles in newly acquired leisure time (Osborne, 2012; Wang, Henkens, & Solinge, 2011a).

Unlike the emphasis on role change, the *continuity theory* argues that retirees adapt effectively to a new life period if they use a primary adaptive strategy, which is maintaining continuity (Atchley, 1989). This means that the adaptation to a new life-period goes well if an individual created relationships, activities, adaptive coping skills or thinking patterns in their life before retirement, and if they continue to use them during transition (Atchley, 1989). Research studies show that an individual may maintain continuity through, for example, engaging in free-time activities (Pushkar et al., 2011) or through having a part-time job during retirement (Feldman & Beehr, 2001).

Another theory is *life course perspective* theory, which talks about two main factors influencing transition: a) an individual's history – which includes work and recreational habits (Carr & Kail 2013); b) an individual's attributions – such as socio-demographic factors, health status, financial situation, as well as transition capabilities (Griffin & Hesketh 2008; Wang, 2007). The approach emphasizes that life transitions are contextually embedded. The experience with retirement depends on the specific circumstances under which adaptation takes place. This theory also stresses that one life sphere is influenced by others, such as the quality of marriage influences the transition, and the transition influences the quality of marriage itself (van Solinge & Henkens, 2005). Based on the life course perspective, an individual who flexibly solved previous life transitions, was less socially integrated with his or her job, and has individual attributes beneficial for a smooth transition, will likely have a positive experience with the adaptation to retirement (van Solinge & Henkens 2008, Wang & Shultz, 2010; Wang, et al., 2011a).

The most currently accepted model explaining adaptation to retirement is *The Resource-Based Dynamic Model for Retirement Adjustment* which understands adjustment to retirement as a process which is influenced by the resources of an individual and changes of these resources during the transition (Wang et al., 2011a). The resources this model works with could be defined as the overall ability of an individual to fulfill his or her needs.

These resources are divided into 6 categories:

- a) *physical resources*, e.g. strength and health status (Jex, Wang, & Zarubin. 2007),
- b) *cognitive resources*, including, for example; speed of information processing and work memory (Wang & Chen 2006),
- c) *financial resources*, including, for example; wages and the amount of pension (Hobfoll, 2002),
- d) *social resources*, e.g. social network and social support (Kim & Feldman, 2000),
- e) *emotional resources*, which includes, for example; emotional stability, sensitivity, mood (Wang, Liao, Zhan, & Shi, 2011b)
- f) *motivational resources*, e.g. self-efficacy.

According to this theory, adjustment to retirement is related to the access an individual has to resources. If retirees have more resources to fulfill their important needs, their adaptation to retirement will be less complicated than for people who do not have enough resources. Moreover, change in a psychological well-being after retirement can be viewed as a result of changes in resources. If an individual's resources do not change significantly after retirement, and they maintain an active lifestyle, their psychological well-being may not change significantly. If, on the other hand, an individual's resources change significantly after retirement, through possibly some mental or physical problem, they may experience more significant changes in their psychological well-being (Topa & Valero, 2017; Wang, 2007). The individual's resources may be also influenced by the variables on various levels. Based on the resource-based dynamic model, the resources are present at the macro level, the organizational level, the work level, the household level, and the individual level. The macro level includes

societal norms and the state's politics. The organizational level is composed of the organizational climate and procedures of human resources. The work level relates to the work conditions and relationship to one's job. The household level involves for example the quality of marriage and the costs related to care-giving. There is also an individual level, which includes for example health-related behavior and individual constitutions (Wang et al., 2011a).

Factors influencing the transition to retirement

Whether an individual adapts well, feels satisfied, and their quality of life is high after retirement, or vice versa, depends on various variables. In order to comprehensively summarize the variables influencing the adjustment to retirement, we were inspired by the group categorization of the authors Wang and Schulz (2010), which was later edited and added in other works, too (Wang et al., 2011; Wang, Hesketh, 2012). These groups include individual variables, pre-retirement job-related factors, family-related factors, retirement transition-related factors, and post-retirement activities.

Individual attributes

The individual variables in the transition to retirement include the physical and mental health, financial status, literacy and goals, habits, and health-related behavior (Wang et al., 2011a; Wang & Hesketh, 2012).

Physical and mental health and problems associated with them are related to the well-being of an individual in the mental, physical, and financial areas, as well as with the overall quality of adjustment in retirement (e.g. Pinquart & Schindler, 2007; van Solinge & Henkens, 2008). At the same time, the good health status of an employee before retirement is one of the most important predictors of physical well-being after retirement (Zhan et al., 2009). In order to maintain physical health, health-related behavior and habits are important (Jex et al., 2007). Health-related behavior reduces the risk of illness, which is related to less future financial expense, which ultimately contributes to a better adjustment to retirement (Topa & Vareno, 2017). We can also look at the relationship between finances and health from the opposite side. Sufficiently financially secure retirees have resources to obtain higher quality healthcare, which is then related to having better health and overall quality of life (Singh, 2006). A good health condition enables a senior to live a more active life, be more independent and have more opportunities to take up his or her hobbies.

Individual financial variables also include financial literacy and financial goals that both contribute to the financial well-being of an individual. If the employee has poor knowledge regarding investment, pension and insurance, they may not know how to determine the amount of money they will need after leaving their job. This lack of knowledge or lack of awareness can lead to worse financial well-being. On the other hand, individuals with more financial knowledge, experience higher financial well-being (Lusardi & Mitchell, 2011). The financial goals are also related to perceived financial readiness (Noone et al., 2009) and to financial planning, which itself has a positive effect on adjustment to retirement (Hershey, Mowen, & Jacobs-Lawson, 2003). Overall, a good financial status contributes to a better adaptation to retirement (Pinquart & Schindler, 2007).

Pre-retirement job-related factors

The variables related to pre-retirement work include factors such as work-related stress, work demands and challenges, job dissatisfaction, unemployment before retirement, the identity of the job role (Wang et al., 2011a), and a disrupted career (Wang & Hesketh, 2012).

Among pre-retirement job-related factors, the identity of a work role was identified as a factor negatively influencing retirement. Seniors who are more strongly identified with their work role, experience worse adaptation to the following life period (Reitzes & Mutran, 2004). If, on the other hand, people experienced stress situations and difficult challenges at work, they cope with the retirement transition without serious hardships (Wang, 2007) and experience the retirement transition as a relief and relax from a previously stressful job. Also, the happiness of retiring was found in employees whose previous job was physically or mentally challenging (van Solinge & Henkens, 2008; Wang, 2007). Research studies highlighting the mental difficulty of a previous job and its effect on the retirement transition, also show, that the health status of an individual can also be improved after retirement (van den Bogaard, Henkens & Kalmijn, 2016). In the context of the above-mentioned research findings, we believe that leaving an environment that places high demands on an employee, whether psychological or physical, may be beneficial to the retired individual.

In the case of individuals who were unemployed right before turning the retirement age, lower well-being was found (Marshall, Clarke, & Ballantyne, 2001; Pinquart & Schindler, 2007), however, well-being and overall life satisfaction was increased after retiring. The authors Hetschko, Knabe a Schöb (2013) explain this change through understanding the social norms. A social norm for people in the productive age states that they should be employed and should have good qualifications. On the contrary, the social norm for seniors does not include these expectations. Therefore, individuals who are unemployed right before retiring do not meet the social norm of productive age. After retirement, they begin to meet the social norm applicable to retirees, which may improve their life satisfaction. Moreover, pre-retirement unemployment is linked with a higher risk of not finding a job which would cover the costs of living for the individual; adding to financial insecurity and thus adversely affecting the transition from employment to retirement (Pinquart & Schindler, 2007).

Family-related factors

The family-related factors include marital status; whether the individual is single, widowed or divorced. An important factor related to marriage is its quality, and also the loss of a partner during retirement. Another variable is the number of dependent individuals a senior has to take care of and the costs related to this care-giving.

It has been shown that seniors in marriage have a higher mental well-being during the transition compared to individuals who are single or widowed (Pinquart & Schindler, 2007). A marital relationship, which is perceived as happy and satisfying represents a factor that has a positive effect on the adaptation to retirement (Szinovacz & Davey, 2004). The reasons could be a gained social support from a partner, lower loneliness in a marriage (Heybroek, Haynes, & Baxter, 2015), a stable identity resulting from being married (Wang, 2007), as well as a higher financial stability during marriage (Lee, 2016). On the other hand, a significant variable with a negative effect on the adaptation to retirement is the loss of a partner (van Solinge & Henkens, 2008).

Besides variables associated with marriage, it is also important to mention variables related to an individual's children and grandchildren. It appears that a retiree who does not have to financially support any dependent children or grandchildren, shows higher retirement satisfaction (Kim & Feldman, 2000; Wang, 2007) compared to those who financially support children or grandchildren. The number of dependent individuals and costs related to care-giving often threaten the financial stability of people during the transition to retirement, which negatively affects their adaptation to retirement (Marshall et al., 2001). Moreover, Szinovacs and Davey (2004) found that individuals who did not have to take care of their grandchildren, experience fewer depressive symptoms than those who had more responsibilities related to the

care-giving to their grandchildren. However, we believe that caring for grandchildren can also be a positive factor contributing to satisfaction and maintaining life-meaning for a retiree. It probably depends on various factors, such as the extent, type of caring and whether this care-giving is voluntary or not. Other research studies would be needed for a better understanding of these relationships.

Retirement transition-related factors

Retirement transition-related factors include voluntary and early retirement, as well as retirement planning, which affects the adaptation of an individual (Wang, et al.; 2011; Wang & Heketh, 2012).

Seniors, who perceive their retirement as a voluntary decision (Reitzes & Mutran, 2004; van Solinge & Henkens, 2007, 2008) and who have been thoroughly preparing for retirement (Rosenkoetter & Garris, 2001; Wang, 2007), have a higher probability of a better adjustment to retirement compared to individuals who retire early and unprepared (e.g. Wang, 2007). Early retirement is associated with lower life satisfaction due to the increased financial pressure that a retiree may experience, even more if the reason to retire early was health problems. On the other hand, early retirement can improve well-being for employees who were dissatisfied at work (Heybroek et al., 2015). Therefore, we might consider that the relationship of early retirement and adjustment is moderated through the dissatisfaction with one's job and through health status.

Retirement planning is also a factor of successful transition to retirement. Planning in the area of finances involves saving for retirement, creating a long-time investment plan, and improving investment choices. Those who have financially planned for retirement felt greater financial well-being than retirees who did not financially plan for retirement (Hershey, Henkens, & van Dalen, 2007). Planning is an important aspect of adaptation even in terms of social activities. Retirees who plan to continue with their social activities or plan to start a more active lifestyle will likely be engaged in certain groups, such as community, leisure, or religious groups. Building one's identity in these group adds to having multiple social identities, which were shown to enhance health and well-being in retirement. Moreover, mediation analysis showed that the relationship between having multiple social identities and adjustment is mediated through social support which an individual provides to other members of these social groups (Steffens, Jetten, Haslam, Cruwys, & Haslam, 2016). Overall, we may say that preparation for retirement allows an individual to gain at least partial control over his or her future, which itself helps to cope with this life period.

Post-retirement activities

Post-retirement activities relevant for the adaptation to retirement include paid employment (whether full-time, part-time or having a temping job), a voluntary job or free-time activities (Wang et al., 2011a).

Previous studies show that if an individual continue in his or her paid job, they have a higher adjustment to retirement (Wang, 2007; Zhan et al., 2009) and even more, if their continuation of the paid job is motivated by generative reasons (Dendinger, Adams, & Jacobson, 2005). However, whether employment has a positive or negative effect on adaptation depends on the type of employment. If a senior remains in the area related to their previous work, the effect of employment on well-being is positive, but continuing work in another area is unrelated to higher well-being (Zhan et al., 2009). The positive effect of continuing paid work could be explained by maintaining good physical and mental fitness (Zhan et al., 2009), by improving the financial

situation (Quinn, 2010), and also by maintaining life meaningfulness which may stem from the feeling that one is useful for others.

Also, individuals who choose volunteering (Dorfman & Douglas, 2005; Smith & Moen, 2004) or have a part-time job, report better perceived health and higher satisfaction with retirement compared to individuals who went from their job to full retirement (Griffin & Hesketh, 2008; Zhan et al., 2009). One possible reason may be that the level of physical and/or cognitive activities in the work behavior adds to maintaining the better health of retirees, and therefore improve their adaptation (Wang & Shultz, 2010).

Besides continuing to have employment or volunteering work it is equally important to have various free-time activities, such as reading books, travelling or doing sports (Dorfman & Douglas, 2005). Even qualified professionals, such as doctors, would advise their colleagues who plan to retire, to have more free-time activities beyond their professional focus, since these activities may help to maintain life satisfaction during retirement (Silver, Hamilton, Biswas, & Williams, 2016).

As we can see, there are variables that affect the transition to retirement in the positive sense, and others in the negative. Individual variables do not act in isolation but are interconnected, so they need to be seen in a wider context. For a better overview of the positive and negative factors influencing the transition to retirement, we created Table 1.

Table 1: Factors influencing the transition to retirement

Categories	Variables	Positive effect	Negative effect
Individual attributes	Perceived physical health	Kim & Feldman (2000); Hyde et al. (2004); Pinquart & Schindler (2007); Shultz & Wang (2007); van Solinge & Henkens (2008); Zhan et al. (2009); Silver et al. (2016)	
	Mental health	Kim & Moen (2002); Wang (2007)	
	Financial status	Reitzes & Mutran, (2004); Singh (2006); Pinquart & Schindler (2007)	
	Health problems		Kim & Moen (2002); Wang (2007)
	Financial goals	Stawski, Hershey, & Jacobs-Lawson (2007); Noone et al. (2009)	
	Financial literacy	Hesketh & Griffin (2010); Lusardi & Mitchell (2011)	
	Health-related behavior	Jex et al. (2007); Topa & Vareno (2017)	
Pre-retirement job-related factors	Work-related stress	Wang (2007); van Solinge & Henkens (2008); van den Bogaard et al. (2016)	
	Job demands, challenges	Wang (2007); van Solinge & Henkens (2008)	
	Job dissatisfaction	Wang (2007); van Solinge & Henkens (2008)	
	Unemployment before retirement	Marshall et al. (2001); Pinquart & Schindler (2007)	
	Identity of a work role		Reitzes & Mutran (2004)
	Physical demands connected to work		Pinquart, & Schindler (2007)
Family-related factors	Marital status	Pinquart & Schindler (2007); Lee (2016); Wang (2007)	
	Status of a working partner	Moen, Kim, & Hofmeister (2001); Wang (2007)	
	Quality of marriage	Szinovacz & Davey (2004); Wang (2007)	
	Number of dependent children		Kim & Feldman (2000); Marshall et al. (2001)
	Loss of a partner during transition		van Solinge & Henkens (2008)
	Costs related to care-giving		Marshall et al. (2001)
Retirement transition-related factors	Voluntary retirement	Reitzes & Mutran (2004); van Solinge, Henkens (2007, 2008)	
	Retirement planning	Rosenkoetter & Garris (2001); Reitzes & Mutran (2004); Wang (2007); Hershey et al. (2007); Babarosa et al. (2016); Steffens et al. (2016)	
	Unexpected early retirement		Wang (2007); Dorn & Sousa-Poza (2010); Heybroek et al., (2015)
Post-retirement activities	Paid work	Kim & Feldman (2000); Wang (2007); Griffin & Hesketh (2008); Zhan et al. (2009); Quinn (2010)	
	Voluntary work	Kim & Feldman (2000); Smith & Moen (2004); Dorfman & Douglas (2005); Zhan et al. (2009); Griffin & Hesketh (2008)	
	Free-time activities	Kim & Feldman (2000); Dorfman & Douglas (2005); Silver et. al. (2016)	

Note: In the table, only research studies published since 2000 are presented.

Conclusion

Retirement is an important transition in an individual's life. In the study we have described the currently most accepted models explaining adaptation to retirement, which are: *the role theory*, *the continuity theory*, *the life course perspective theory* and *the resource-based dynamic model for retirement adjustment*. Based on the review of these theoretical models, it can be said that the quality of adaptation to retirement depends on how important the work role for a retiree was (George, 1993; Osborne, 2012), whether a retiree was able to sustain continuity in his or her activities or social relationships (Solinge & Henkens 2008), and whether they have maintained enough resources, e.g. in the social, financial or health areas (Wang et al., 2011a). In this review, our specific aim was to explore the factors positively and negatively related to the retirement adjustment. We have examined the factors in the following thematic areas: individual attributions, variables related to work before retirement, variables related to family, factors related to transition, and activities after retiring.

Increased awareness of factors with a positive and negative effect on retirement adjustment can be beneficial not only to individuals working in helping professions to be able to assist retirees in their transition, but also to retirees themselves in order to prepare for retirement and cope with the retirement transition more effectively. It is therefore recommended that programs of preparation to retirement should be aimed at increasing the individual research-based factors with a positive effect on the adaptation to retirement; as for example various free-time activities, voluntary work or health-related behavior in retirees. Based on the identification of research-based risk factors on adaptation to retirement, work psychologists or various organizations, such as clubs for seniors, may focus on mitigating the negative consequences of these risk factors. Although some risk factors, such as loss of a partner, are impossible to prevent, it is possible to help retirees to create supporting relationships in the clubs for seniors, but also to help retirees to learn effective coping strategies.

We would like to mention the benefits of this review study in the Slovakian context. Firstly, most of the articles regarding retirement in the Slovak republic are economic and sociological in nature (e.g. Meszárošová, Wsólová, & Gazdíková, 2017); with a lack of psychological studies on this topic. Therefore, we hope that we have added to Slovakian scientific literature in regards to the retirement transition from a psychological perspective, too. Indeed, to the best of our knowledge, this is the first literature review concerning the factors of adaptation to retirement published in a Slovakian context. Secondly, the evidence of research-based factors positively and negatively related to adaptation to retirement could stimulate further research in this area. For example, there has already been conducted one qualitative study about the process of retirement transition and its related factors (Martinčeková et al., under review), and there is a strong need for other quantitative studies which would examine the effect of these factors on retirees' adjustment to retirement in Slovakia. In order to conduct these studies, it would also be essential to validate some of the most often used research methods in the context of transition to retirement, such as the Retirement Satisfaction Inventory (Floyd et al., 1992) and the Retirement Resources Inventory (Leung & Earl, 2012) on a Slovak sample. Thirdly, we hope our study will stimulate further experimental research, which could be aimed at testing the effect of some of the research-based positive factors on the retirement adaptation, such as the effect of financial planning.

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Beyond Czech and Slovak differences in Hofstede's Masculinity index: An investigation of cross-cultural differences using Hofstede's and Schwartz's framework

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Abstract:

A number of studies adopting either Hofstede's Cultural Values Survey approach or Schwartz's concept of Value Types have documented major distinctions in value preferences between Czechs and Slovaks. The most prominent one has been represented either by the dimension of Masculinity (as constructed by Hofstede) or value type of Achievement (a concept of Schwartz); both defined by similar content, stressing the importance of success, achievement and competence. In all the five published comparisons so far – two based on Cultural Values Survey by Geert Hofstede (Kolman, Norderhaven, Hofstede, & Dienes, 2003, Bašňáková, Brezina and Masaryk, 2016) and three on value types by Shalom Schwartz (Schwartz & Bardi, 1997, Schwartz, Bardi & Bianchi, 2000 and Ilgová & Ritomský, 2009), -- Slovak participants scored higher in both Masculinity (MAS) and Achievement. Interestingly, Slovakia's MAS score reported by Kolman et al. (2003) reached one of the highest values of all the surveyed countries with the VSM instrument, thus becoming an international outlier. As we concluded in our previous report of cross-cultural differences in Bašňáková et al. (2016), it remains puzzling why two nations that share a similar geographical and historical context would differ on the Masculinity dimension by such a large margin. In this study, we therefore aim to explore this difference in more detail. For that purpose, we contrasted two matched samples of Czech (N=200) and Slovak (N=200) participants representative of the two populations. In essence, we believe that there are two possibilities behind the difference in Masculinity. Firstly, the reported difference between Czechs and Slovaks is psychologically valid and therefore can be explained in terms of another number of cultural dimensions, such as the value system by Schwartz, and/or by underlying demographic factors. However, we cannot a-priori exclude a more mundane reason for the difference. Secondly, that it is simply an artefact of the questionnaire brought about by a small number of outlying items; for example because there are systematic differences in how participants in the two countries interpret a particular item. In order to differentiate between these two positions, and create a more grounded reference, we focused our analysis on three issues: (1) Identification of demographic factors that relate to Masculinity in both samples, (2) Comparison of Masculinity with Schwartz's individual value types, (3) Analysis of the items constituting the Masculinity index. As for demographic factors, there is a possibility that the difference between Czechs and Slovaks on Masculinity is caused by some underlying factor(s), which in itself is not a cultural-psychological dimension of value differences but can explain the level of a studied value. The most likely candidate would be religious affiliation, as traditionally Slovaks are mostly Catholics – 62% in the 2011 Census (Slovak Statistical Office, 2011), while Czechs are non-confessionals (two major Churches – Roman Catholics and Protestants together claim less than 20% believers

according to the 2011 Census (Czech Statistical Office, 2013)). Regarding the second issue, we believe that the Czech and Slovak Masculinity difference can be explained in terms of differences in individual value types. There are several value types which we expect to correlate with the Masculinity index; above all, based on their theoretical formalization, are the cases of Achievement and Power (or Universalism and Benevolence, in negative correlation). Lastly, concerning the item analysis (3rd issue) we refer to Ripková and Masaryk (2015), who asked Czech and Slovak students to discuss items from the VSM08 questionnaire. One of the main findings of the study was that several items were interpreted quite differently both within and across the countries. This prompted us to look in more detail at the four items that make up the MAS index. Of the four, three items reached equal average scores in both Czech and Slovak participants. However, item number 8 (whether when choosing his/her ideal job, a participant would consider as important to „live in a desirable area“) differed considerably. Interestingly, this was precisely one of the items which the Czech and Slovak participants of the Ripková and Masaryk study tended to interpret in different ways. In both Czech and Slovak student focus groups, the interpretation was ambiguous as to whether “attractive“ means “subjectively attractive“ (*I like the place and feel good living in it*), which is more in line with Hofstede's feminine values, or “objectively attractive“ (*it is in a prime locations, on a good address*), which is more in line with masculine values. We therefore conducted an analysis where the influence of this item on the resulting Masculinity index was minimized, and explored its impact on the overall score. Our results, based on participants' responses to VSM2013 and PVQ21 and their demographic information, suggest that factors such as religious affiliation, age, gender and residence size were not major predictors of cross-cultural differences in Masculinity, but rather this single item on Hofstede's VSM 2013 questionnaire. After minimizing the influence of item number 8 on the MAS score, we found that not only did the large difference between Masculinity in Czechs and Slovaks disappear, but also that Masculinity was now better accounted for by the two Schwartz's values that we have predicted based on theoretical grounds: Achievement and Power. What remains to be discussed is whether the differences in item 8 are merely an artefact of the instrument (e.g. Czech and Slovak participants understood the item in systematically different ways) or whether this item taps into real and profound differences in Czech and Slovak cultures. This particular finding offers support to the assumption that the validity of differences in Masculinity between Czechs and Slovaks as measured by Kolman et al. (2003) and Bašnáková et al. (2016) is, at least in part, influenced by either a) methodological artefacts (instrumental validity) or b) construct bias. One theoretical possibility brought about by our findings is that while the dimension of Masculinity might be culturally universal, the items devised to measure it could have culture-specific content.

Keywords:

Dimensions of National Culture. Masculinity. Individual Value Types. VSM 2013. PVQ21.

Introduction

Cultural comparisons of values represent an important milestone in the development of cross-cultural psychology. For decades, the topic has formed the core of international research interest in psychology. There has been only very limited use of samples from Czechoslovakia in the first waves of comparative studies on values. Information about Czech and Slovak cultures started to enter world-wide value databases with real data instead of estimates only after the separation of Slovaks and Czechs and the creation of two independent states in 1993. There are five published comparisons so far - two based on Cultural Values Survey by Geert Hofstede (Kolman, Norderhaven, Hofstede, & Dienes, 2003, Bašnáková, Brezina & Masaryk, 2016) and three on value types by Shalom Schwartz (Schwartz & Bardi, 1997, Schwartz, Bardi & Bianchi, 2000 and Ilgová & Ritomský, 2009). The major distinction in value preferences between Czechs and Slovaks has been often represented either by the dimension of Masculinity (as constructed by Hofstede) or value type of Achievement (a concept of Schwartz), both defined by similar content, stressing the importance of success, achievement and competence. Slovak samples have been found to score higher in both Masculinity (MAS) and Achievement in all of

these surveys¹. Interestingly, Slovakia's MAS score reported by Kolman et al. (2003) reached one of the highest values of all the surveyed countries with the VSM instrument.

Existing interpretations of the dominant position of Slovakia on Masculinity in the literature are usually tentative, based predominantly on analyses of socio-historical context of the two nations. There is a lack of psychometric comparisons, especially the effort to interpret one set of cultural dimensions in light of another, related set. In this paper we are therefore trying to explain the differences by relating Masculinity as a national dimension of culture to Schwartz's value types based on data acquired from the same sample of participants across the two countries. In order to understand more clearly the context of Masculinity in these two cultures and the factors that can explain it, we also employed two additional strategies: investigating selected demographic variables as predictors of these differences, as well as focusing on details of Hofstede's scale related to the measurement of Masculinity in the Czech and Slovak samples.

Previous findings on cross-cultural differences in values between Czechs and Slovaks

The first data collection on the Czech and Slovak populations using the Values Survey Module (VSM), version 98, was carried out by Kolman et al. (1999, 2003). As it was designed to capture differences on Hofstede's dimensions of national culture among central European countries, the report also included Poland and Hungary; with the Netherlands as an anchor country. As already mentioned, the results placed Slovak Masculinity scores at the very top of an international database comprising dozens of national cultures. Slovaks were also characterized by a high level of Power distance (PDI) and, in relative terms, by average values on another two dimensions (Individualism, Long-term Orientation). As for the Czech data, it was far less extreme; with a Masculinity score of 77 in contrast to the Slovak score of 127. Czech and Slovak data was collected from university students, i.e. mostly participants in their twenties, and the sample was unbalanced with regard to gender (for a more detailed critique of the sample, see Bašňáková et al., 2016).

Over a decade later, Bašňáková, Brezina and Masaryk (2016) collected another set of data using a newer version of the Values Survey Module (VSM 13) on a representative sample of 200 participants in each country that were carefully matched regarding gender and age (mean age for Czechs and Slovaks 42.2, SD 14.7). Comparing Slovaks with Czechs on calibrated data via a matched Dutch sample, the authors presented results that reached considerably less extreme values than Kolman et al. While differences between Czechs and Slovaks in most dimensions were only small, it was again Masculinity that presented an exception. It did reach lower *absolute* values than in Kolman's study (calibrated scores were 83 for Slovakia and 62 for the Czech Republic, raw scores 34.5 and 14, respectively), but the difference of about 20 points was still highly significant in the same direction.

The high Masculinity scores in the Slovak sample, and the fact that the highest relative difference to the Czech results was on this dimension, were referenced to another comparative value study carried out by Ilgová and Ritomský (2009). They compared Schwartz' individual value types in Czech and Slovak young people, and found major differences in the values of Tradition, Achievement (both higher in Slovak population), Hedonism and Power (higher in Czechs). Even though this sample was different than the more representative sample used in our study (Bašňáková et al., 2016), these results represent a valid reference regarding the cross-

¹A notable exception are Schwartz & Bardi (1997) and Schwartz, Bardi, & Bianchi (2000) who used different methodology, not compatible with the PVQ framework.

cultural differences in Masculinity. The authors reached the conclusion that for the majority of Slovak youth, acceptance of the way of thinking and habits of their traditional culture, as well as a reliance on faith and philosophy, are very important. On the other hand, sensual satisfaction, enjoyment of life and hedonism gain more weight in the Czech population of the same age (15 to 34 years).

Both Schwartz value types and Hofstede's dimensions of national culture present probably the most frequently used measures for comparing human values at the cultural level. Although both theoretical frameworks as well as methodology in Schwartz and Hofstede's legacies are very distinct (see Section 1.3), results of the three relevant studies applying the two approaches within the context of Czech and Slovak samples seem to bring relatively consistent findings throughout the last decades. However, the two frameworks have never been contrasted in the same sample of population within these two cultures. Such a comparison can help us understand the content of the Masculinity index and the studied cultural differences.

Brief description of the two cultural value models

While Hofstede derived his framework empirically, Schwartz developed his framework theoretically. Both scholars have empirically examined their frameworks using large-scale multi-country samples and found greater cultural differences between countries than within countries, suggesting the frameworks could be used to compare countries/cultures. The fact that Hofstede's dimensions are applicable exclusively at the cultural level, in contrast to Schwartz value types designed to be employed in both cultural and inter-individual comparisons, can be considered as the most significant difference between the two approaches.

Research problem

As we concluded in our previous report of cross-cultural differences in Bašnáková et al. (2016), it remains puzzling why two nations that share a similar geographical and historical context, would differ on the Masculinity dimension by such a large margin. In this study, we therefore aim to explore this difference in more detail. In essence, there are two possibilities behind the difference. Firstly, the reported difference in Masculinity between Czechs and Slovaks is valid and therefore can be explained in terms of another array of cultural dimensions, such as the value system by Schwartz, and/or by underlying demographic factors. However, we cannot a-priori exclude a more mundane reason for the difference. Secondly, that it is simply an artefact of the questionnaire brought about by a small number of outlying items (e.g. that there are systematic differences in how participants in the two countries interpret a particular item). In order to differentiate between these two positions, and create a more grounded reference, we focused our analysis on three issues:

1.) Can we explain differences in Masculinity solely with reference to demographic factors?

One possibility is that the difference between Czechs and Slovaks on Masculinity is caused by some underlying factor(s), which in itself is not a cultural-psychological dimension of value differences but can explain the level of a studied value. The most likely candidate would be religious affiliation, as traditionally Slovaks are mostly Catholics – 62% in the 2011 Census (Slovak Statistical Office, 2011), while Czechs are non-confessionals (two major Churches –

Roman Catholics and Protestants together claim less than 20% believers according to the 2011 Census (Czech Statistical Office, 2013)). Based on Hofstede's findings (2001), we expect MAS index to correlate positively with (the existence of) religious belief. Within the context of religious affiliation, Hofstede claims that "on average, countries with Catholic tradition tend to maintain more masculine and those with Protestant tradition more feminine values" (2001, p. 327). Although direct comparison of MAS in people with and without religious affiliation is not found in the literature, Hofstede points to secularization, or to a belief that "religion is not important in life" as examples representing low masculinity. The importance attributed to religion (as compared to other values in EVS study) was highly correlated with MAS (Hofstede, 2001, p. 327).

2.) Can we explain differences in Masculinity by underlying differences in Schwartz's value types?

Since both questionnaires were filled in by the same participants, we can cross-reference the data. In theory, the Czech and Slovak Masculinity difference can be explained in terms of differences in individual value types. There are several value types which we expect to correlate with the Masculinity index; above all, based on their theoretical formalization, are potentially positively correlated Achievement and Power, or, negatively correlated Benevolence and Universalism. On the second level of Schwartz theory, we focus on relation of MAS and Self-Enhancement (positive) and Self-Transcendence (negative).

3.) Can we explain underlying Masculinity differences through item analysis?

In a qualitative study by Ripková and Masaryk (2015), Czech and Slovak students were asked to discuss items from the VSM08 questionnaire, and one of the main findings was that several items were interpreted quite differently both within and across countries. This prompted us to look in more detail at the four items that make up the MAS index. Of the four, three items reached equal average scores in both Czech and Slovak participants. However, item number 8 (whether when choosing his/her ideal job, the participant would consider „living in a desirable area“ to be of importance) differed considerably. Interestingly, this was precisely one of the items which the Czech and Slovak participants of Ripková and Masaryk study tended to interpret in different ways.

In both Czech and Slovak student focus groups, there was a general disagreement on whether "location" pertains to the location of the workplace or of place of residence. More importantly, the interpretation was ambiguous as to whether "attractive" means "subjectively attractive" (*I like the place and feel good living in it*), more in line with Hofstede's feminine values, or "objectively attractive" (*it is in a prime locations, a good address*), more in line with masculine values. In the small student sample, there was a consistent split between these two interpretations among Czech (8/11) and Slovak (6/11) participants; unfortunately, both samples were mostly females and thus we cannot make any generalizations as to whether there was a gender bias in interpreting the question. Even though we cannot be sure whether our participants experienced the same confusion, this is a potential cause for concern. We therefore conducted an analysis where the influence of this item on the resulting Masculinity index was minimized, and explored its impact on the overall score.

Methods

Participants

Our sample consisted of 200 Czech and 200 Slovak participants identical with the sample recruited for Bašnáková's research (2016, et al.) by Taylor, Nelson, Sofres (TNS), a leading market research group. The mean age of the Slovak sample reached 41.4 (SD=14.9), compared to 43.0 (SD=14.4) in the Czech sample. Both genders were equally represented in the Czech (100M/100F) and Slovak samples (99M/101F). We used the Quota Sampling procedure to select the participants according to age, gender, region, and size of their place of residence, matching the distribution of these variables in the respective populations. Participants were selected from an online panel of participants maintained by TNS. All the respondents were paid by the agency for their participation.

Instruments

We used the VSM 2013 and PVQ21 together with 8 additional questions designed to capture demographic information (see Procedure). Here, we describe the two value questionnaires in more detail.

The evolution of VSM dates back to 1967 when G. Hofstede started to collect responses to value statements from more than 117,000 IBM employees in 40 nations in search of cultural solutions to organizational problems. The following four cultural dimensions were derived from this data (Hofstede, 1983) and remain at the heart of much cultural research:

- (1) *Power distance (PDI)*. The extent to which people accept that power in institutions and organizations is distributed unequally;
- (2) *Uncertainty avoidance (UAI)*. The extent to which people feel uncomfortable with uncertainty and ambiguity;
- (3) *Individualism (IDV)*. A preference for a loosely knit social framework in which individuals take care of themselves and their immediate families. *Collectivism* is the alternative and it is a preference for a tightly knit, social framework in which individuals expect relatives, clan, or another in-group to look after them in exchange for loyalty;
- (4) *Masculinity (MAS)*. A preference for achievement, heroism, assertiveness, and material success rather than *Femininity*, which is a preference for relationships, modesty, caring for the weak, and quality of life (Hofstede, 2001).

For comparison, S. Schwartz (1992) administered a list of 56 (later 57) value items to student, teacher, adult, and adolescent samples in over 70 countries. He tested the hypothesized typology and structural relations in each sample using smallest space analysis and a configurational verification approach (a type of multidimensional scaling intended for hypothesis testing; Borg & Groenen, 2005). For this purpose, he partitioned the value space into conceptually coherent regions of value items. The analyses demonstrated that the two-dimensional array of value items can be: (a) partitioned into regions that represent ten motivationally distinct types of values, (b), that the regions of the values are ordered around a circle in a manner that reflects their mutual compatibilities and conflicts, and that (c) 45 (later 46) of the value items emerge in the spatial region of their predicted motivational type of value in at least 75% of more than 200 samples (Schwartz, 2006). Two dimensions, labelled "Openness to change versus conservation" and "Self-enhancement versus Self-transcendence," summarize the relations between the values in the space.

Within these two dimensions, ten individual value dimensions were identified that represented likely conflicts and compatibility between values. These individual (or first-order) level value types are described below (Schwartz and Bardi, 2001, p. 270):

- (1) *Power*. Social status and prestige, control or dominance over people and resources.
- (2) *Achievement*. Personal success through demonstrating competence according to social standards.
- (3) *Hedonism*. Pleasure and sensuous gratification for oneself.
- (4) *Stimulation*. Excitement, novelty, and challenge in life.
- (5) *Self-direction*. Independent thought and action – choosing, creating, exploring.
- (6) *Universalism*. Understanding, appreciation, tolerance, and protection for the welfare of all people and for nature.
- (7) *Benevolence*. Preservation and enhancement of the welfare of people with whom one is in frequent personal contact.
- (8) *Tradition*. Respect for, commitment to, and acceptance of the customs and ideas that traditional culture or religion impose on the self.
- (9) *Conformity*. Restraint of actions, inclinations, impulses likely to upset or harm others and to violate social expectations or norms.
- (10) *Security*. Safety, harmony, and stability of society, of relationships, and of self.

As Schwartz's value types were derived from a set of items “developed to measure the content of individual values recognized across cultures” (Schwartz, 1994, p. 88), the author claims that the items are close to an exhaustive set of etic cultural dimensions, and that Hofstede's four dimensions are included within these dimensions (Schwartz, 1994).

Schwartz's cultural model has been validated in relation to the dimensions of Hofstede's model. An Individualism Index was positively correlated with Affective and Intellectual Autonomy and with Egalitarian Compromise (Schwartz, 1994), and negatively correlated with Conservation and with Hierarchy (Gouveia and Ross, 2000). As for Masculinity, MAS index correlates positively with Schwartz's value dimension of Mastery (ambitious, capable, choosing own goals, daring, independent, successful) across 23 overlapping countries of Hofstede IBM research (Hofstede, 2001). Conceptualization of Mastery, as cultural emphasis on getting ahead through active self-assertion (ambition, success, daring, competence) is in line with value type of Achievement defined at the individual level by personal success through demonstrating competence according to social standards (ambitious, successful, capable, influential).

According to Hofstede (2001) in the Gordon Survey of Interpersonal Values, MAS was negatively related to benevolence in male students, defined almost identically as Schwartz's benevolence (sharing with others, helping the unfortunate, being generous) which occupies a conflicting position to Achievement. Interestingly, MAS is the only one of four dimensions of national culture that proves no relation to a country's wealth (Hofstede, 2001).

As to the statistical comparisons of Masculinity per se with Schwartz's Value types, we have not found any relevant evidence in the literature. Based on the above theoretical assumptions, the dimension is expected to correlate positively with Self-enhancement values represented by Achievement, Power or/and Hedonism and negatively with values of Self-transcendence (Benevolence, Universalism, Conformity).

Values Survey Module 2013, used in this study, is a questionnaire developed by G. Hofstede and designed for comparing culturally influenced values and sentiments of similar respondents from two or more countries. It allows scores to be computed on six dimensions of national culture², on the basis of four questions per dimension. Participants indicate their level of identification with each statement on a 5-point Likert-type scale.

Most of the items in VSM 2013 are new or have been changed to the extent that they can no longer be equated to a single VSM94 item (which to a large extent applies to VSM 08 as well), while a portion of the original questions remain identical in content and only the wording was adjusted; including the reversion of answers (Bašňáková et al., 2016). The authors of the manual for VSM 08 state that "the new items in the new version were chosen because of their similarity to items in other reliable studies, but the reliability of the new version cannot be proven a priori" (Hofstede et al., 2008, p. 11).

In translating the VSM13 questionnaire into Slovak and Czech, we proceeded as follows. First, native speakers of each of the languages (Czech and Slovak) with full professional proficiency in English translated the VSM 2013 from English. Then, these translations were back-translated into English and any inconsistencies were discussed. Lastly, the final translations were checked by Czech and Slovak native speakers who had not seen the original translations. Even with such a careful translation procedure, however, items in an intercultural survey may not be universally equivalent. Certain concepts may have ambiguous meaning as well as certain questions may have different connotations in different cultures. We return to this issue in the Discussion.

Portrait Values Questionnaire is a values scale adopted from S. Schwartz's work on basic human values. Although the findings generated from the PVQ do demonstrate individual level values, PVQ has been used in over 70 countries so far, and provides evidence of consistency. In studies across the world, Schwartz and Bardi (2001) identified a high level of pan-cultural agreement regarding the hierarchy of importance of the ten values. PVQ has been adopted to form part of the European Values Survey project.

PVQ consists of 21 questions that form 10 motivationally distinct values types. Given that nine values are measured by only two items and the tenth by three, two studies of student samples have assessed the test-re-test reliability of the ten values, as measured by the PVQ. Respondents completed the PVQ twice, separated by an interval of two weeks in Israel and six weeks in Germany. The test-re-test reliabilities (Israel & Germany) were moderate to high: Power .84 & .77, Security .88 & .70, Conformity .86 & .72, Tradition .81 & .80, Benevolence .82 & .62, Universalism .83 & .75, Self-direction .66 & .70, Stimulation .74 & .76, Hedonism .84 & .65, and Achievement .83 & .82. The Czech and Slovak versions of the PVQ scale were downloaded from the EVS website in November 2013. The questionnaires were administered online through the TNS agency in December 2013.

Procedure

For each participant, we computed Hofstede's uncalibrated Masculinity score according to the manual (Hofstede and Minkov, 2013) ($MAS = 35*(item5-item3)+35*(item8-item10)$, see Table 1.).

² Individualism, Power Distance, Masculinity, Uncertainty Avoidance, Long-term Orientation, Indulgence vs. Restraint.

Table 1: MAS index: In VSM13, the Masculinity index, according to Hofstede & Minkov (2013), is calculated as follows: $MAS = 35*(item5-item3)+35*(item8-item10)$. The equation refers to the four items listed in this table.

In choosing an ideal job, how important would it be to you to...
3. Get recognition for good performance
5. Have pleasant people to work with
8. Live in a desirable area
10. Have chances for promotion.

The difference in Masculinity scores between Czech and Slovak participants was significant, with Slovaks scoring higher than Czechs (Mann-Whitney non-parametric U-test: $U=1.578$, $p<.001$). We also computed 10 first- and 4 second- level value indices of Schwartz (see Table 2). We used raw scores for all analyses and did not adjust for differences in scale use (“centering”), but we made sure that there were no significant differences between Czech and Slovak item means (“MRAT”, i.e. individual mean scores across all items). The scores were reversed from their original direction, because in Schwartz’s questionnaire, “1” signifies a higher loading on a particular value and “6” signifies a lower loading. The purpose of the score-reversion was to make the direction of scores more intuitive (higher loading = higher score) and it did not influence the interpretation of results. As for demographic variables, we collected information about gender, age, residence size, education and religiosity.

Table 2: Hofstede’s Masculinity index and Schwartz’s value types by country (S1 denotes first-order values, S2 denotes second-order values). Standard deviations are in parentheses. Masculinity indices are uncalibrated (raw scores). For value types, “1” indicated low loading, “6” indicated high loading on a given value. Non-parametric Mann-Whitney U-test for comparing two independent samples was used. Significant differences between countries are in bold. Last column indicates effect sizes (r_m).

	Slovak participants	Czech participants	z-statistics	p	Effect size (r_m)
Masculinity (H)	34.48 (49.56)	14.00 (54.92)	-3.76	< .001	0.188
Conformity (S1)	2.92 (1.00)	3.05 (1.12)	-1.48	.14	0.074
Tradition (S1)	3.17 (0.97)	3.18 (1.02)	-1.42	.89	0.071
Benevolence (S1)	3.44 (0.89)	3.68 (0.77)	-2.71	.01	0.136
Universalism (S1)	3.48 (0.77)	3.54 (0.78)	-.82	.42	0.041
Selfdirection (S1)	3.58 (0.86)	3.69 (0.90)	-1.91	.06	0.096
Stimulation (S1)	2.63 (1.12)	2.57 (1.14)	-.50	.62	0.025
Hedonism (S1)	2.62 (1.17)	2.91 (1.08)	-2.43	.02	0.122
Achievement (S1)	2.95 (1.08)	2.73 (1.09)	-1.94	.05	0.097
Power (S1)	2.40 (1.07)	2.49 (1.07)	-.71	.48	0.036
Security (S1)	3.31 (1.03)	3.48 (0.98)	-1.62	.10	0.081
Self-transcendence (S2)	3.46 (0.73)	3.61 (0.69)	-2.02	.04	0.101
Self-enhancement (S2)	2.67 (0.97)	2.61 (1.00)	-.55	.58	0.028
Conservation (S2)	3.13 (0.78)	3.24 (0.79)	-1.27	.20	0.064
Openness To Change (S2)	2.94 (0.86)	3.06 (0.82)	-1.40	.16	0.070

Statistical software IBM SPSS 22.0 was used for data analysis. A multiple linear regression analysis, The Enter method, was used for studying the relationship between Masculinity and demographic variables. The Enter method was used to ensure that no demographic variable was excluded from the model because the aim of the analysis was to have models with all variables in the two subgroups. Sample sizes (N=200 in both groups) meet the requirements for regression analyses (Tabachnick, Fidell, 2007). Our analytic strategy combined confirmatory and exploratory approaches³. The Spearman rank correlation was used for assessing the relationship between Masculinity and other studied cultural values. The Stepwise multiple regression analysis was used to study the relationship between Masculinity and other cultural values together with demographic variables. The Stepwise method was used to statistically simplify the model to only statistically significant variables. The above mentioned analyses together with Mann-Whitney U test were used with the new score of Masculinity where we controlled for the influence of item 8⁴.

Results

We report our results according to the three theoretical issues stated in the Introduction.

1.) Can we explain differences in Masculinity with reference to demographic factors?

In order to test whether there is a relationship between a country's Masculinity score and its demographics, we used two separate multiple regression analyses (the Enter method), one for each country. We decided to include gender (men, women), age, education, religious affiliation (believers, non-believers)⁵, and residence-size (up to 5,000 inhabitants, between 5,000 and 100,000, and more than 100,000) as candidate demographic predictors in the model. The Czech model was not statistically significant ($F_{(5,194)} = 2.03, p = .076$). In contrast, the Slovak model was statistically significant ($F_{(5,194)} = 3.035, p = .012, R^2 = .073$). In the Slovak sample, both religion ($\beta = -.189, p = .008$) and residence-size ($\beta = .165, p = .020$) predicted Masculinity scores (Table 3, 4). However, the proportion of explained variance was only 7.3%. Non-believers in the Slovak sample were significantly more masculine than believers. This finding contrasts with assumptions by Hofstede (2001), which would predict the opposite pattern of results. Also, there was a significant gradient along residence size, with the highest masculinity scores recorded from participants from small villages and lowest from participants from big cities, including the capital city. In conclusion, our data shows that there is a lack of evidence that the difference between Czechs and Slovaks in Masculinity is caused by an underlying demographic factor, or a combination of such factors.

Table 3: Overall evaluation of the model predicting Masculinity from demographic variables

	R	Adj R ²	F	p
Model 1 (Slovak Republic)	0.269	0.073	3.035	<.012
Model 2 (Czech Republic)	0.223	0.050	2.034	<.076

³ Some of our results might be biased by FDR.

⁴ In reference to section "Results", sub-section 3.

⁵ We created these two groups based on participants' self-assessment which in some cases did not correspond to their formal religious affiliation (e.g., a baptised Catholic declared to be a non-believer).

Table 4: Regression coefficients of predictors in two models predicting Masculinity from demographic variables

		B	SE(B)	β	t	p
Model 1 (Slovak Republic)	Education level	6.718	7.190	.066	.934	.351
	Residence size	-7.314	2.725	-.189	-2.684	.008
	Religion	16.692	7.117	.165	2.345	.020
	Age	-.131	.239	-.039	-.546	.585
	Gender	-8.910	6.938	-.090	-1.284	.201
Model 2 (Czech Republic)	Education level	15.597	7.860	.142	1.985	.049
	Residence size	-3.247	2.780	-.083	-1.168	.244
	Religion	13.198	9.003	.104	1.466	.144
	Age	-.153	.272	-.040	-.564	.573
	Gender	-11.422	7.817	-.104	-1.461	.146

B – non-standardised regression coefficient, SE(B) – standard error of non-standardised regression coefficient, β – standardised regression coefficient

2.) Can we explain differences in Masculinity by underlying differences in Schwartz's value types?

To see which value types were correlated with Masculinity, we conducted a series of non-parametric correlational analyses (Spearman) with MAS and first and second level value indices for both countries. As for the first level values, there were only very weak correlations between these values and masculinity, with correlation coefficients (r_s) ranging between .018 (Hedonism) and .194 (Achievement). This did not change when we split the sample by countries (highest .153 for SK/Achievement and .247 for CZE/Power, $p < .001$ and .199 for CZE/Achievement, $p = .005$; Table 6), or when we correlated MAS with second-level values of self-enhancement (r_s between $-.030$ and $-.174$).

A weak relationship between Masculinity and Schwartz's value types was also confirmed by multivariate regressions (the Enter method) with masculinity and value scores for each country separately. Neither model was statistically significant (SK: $F_{(10,189)} = 1.372$, $p = .196$, CZ: $F_{(10,189)} = 1.601$, $p = .109$).

In order to see whether differences in Masculinity can be explained by a combination of demographic variables and value types, we conducted another series of the Stepwise multiple regression analyses. This type of analysis was chosen in order to see if some independent variables will show some significance according to statistical criteria in predicting Masculinity. The Slovak model was identical to the one referenced above, with only demographic variables – residence size ($\beta = -.196$, $p = .005$) and religiosity ($\beta = .153$, $p = .028$) being significant predictors of Masculinity scores (Table 5), but no value types (SK: $F_{(2,197)} = 6.16$, $p = .003$). Just as before, the Czech model did not include any demographic variables (CZ: $F_{(1,198)} = 4.00$, $p = .047$). However, Power now showed up to be a significant predictor of Masculinity scores ($\beta = -.218$, $p = .002$; Table 5). Again, these models explained a rather small portion of the overall variance associated with Masculinity scores (5.9% for Slovaks and 6.6% for Czechs).

Table 5: Regression coefficients of predictors in two Stepwise models predicting Masculinity from demographic variables

		B	SE(B)	β	t	p
Model 1 (SR)	Residence size	-7,57	2,67	-,196	-2,83	,005
	Religion	15,47	6,99	,153	2,21	,028
Model 2 (CR)	Residence size	15,44	7,72	,141	2,00	,047

B – non-standardised regression coefficient, SE(B) – standard error of non-standardised regression coefficient, β – standardised regression coefficient

Similarly, as in the previous section, our findings do not provide evidence that MAS differences between Czechs and Slovaks can be simply accounted for by reference to underlying Schwartz value types.

3.) Can we explain underlying MAS differences through item analysis?

As a second alternative explanation of MAS differences between Czechs and Slovaks, we investigated the contribution of individual item scores to the overall result. As 3 of the 4 item values making up Hofstede's Masculinity index had practically identical mean scores across the Czech and Slovak samples (in one feminine (no.5) and two masculine (no. 3 and 10) items), we only focused on item 8, which was significantly higher in Slovakia than in the Czech Republic. Due to the nature of the MAS index calculation, it was not possible to simply exclude it from the analysis and compute the index based on the three remaining items. In order to minimize the potential contribution of item 8 to the overall MAS index, we set it to a neutral value for each participant (3 on a 5-item scale). Next, we computed a new masculinity score (MAS_new) and conducted all of the above analyses with this score.

First of all, the difference between Slovaks and Czechs on Masculinity was no longer statistically significant ($U=18592$, $p=.209$), with Slovak new MAS value reaching 27.83 and Czech MAS value reaching 23.28 points (difference of 4.55 points).

As for the association of the new Masculinity score with demographic variables, a multiple regression analysis (the Enter method) showed a minimal change to the same analysis with the original Masculinity scores (in section 3.1). Again, only the Slovak model was significant ($F_{(5, 194)}=3.073$, $p=.011$), with only one significant variable - residence size ($\beta=.148$, $p=.037$). As for religiosity, there was now only a trend ($\beta=-.125$, $p=.077$). In addition, there was also a trend for age ($\beta=-.132$, $p = .068$).

Interestingly, the correlations between new Masculinity (new MAS) and Schwartz's first level value types (section 3.2) were now stronger, with the predicted value types and in the predicted directions. Specifically, the two strongest correlations with the new Masculinity value were with Achievement ($r_s=.393$) and Power ($r_s=.329$), both $p<.001$. A similar increase was seen for second-order values: both Self-enhancement and Openness to Change correlated with Masculinity with their respective correlation coefficients .393 and .282, both at $p<.001$.

This was also the case when we looked at the results per country (Table 6). For Slovakia, the strongest correlations were found for Achievement ($r_s=.417$, $p<.001$) and Power ($r_s=.280$, $p<.001$). For second-order values, the strongest correlation was between the new Masculinity and Self-enhancement ($r_s=.375$, $p<.001$) and Openness to Change ($r_s=.245$, $p<.001$). For the Czech Republic, the same two first-order values correlated with Masculinity most strongly:

Achievement ($r_s=.359$, $p<.001$) and Power ($r_s=.379$, $p<.001$). In addition, Stimulation correlated at about the same level ($r_s=.304$, $p<.001$). Just as for Slovakia, Self-enhancement ($r_s=.400$, $p<.001$) and Openness to Change ($r_s=.318$, $p<.001$) were the two second-order values most strongly correlated with Masculinity.

Table 6: Correlation (r_s) between Schwartz's value types and MAS and new MAS scores in two samples

	SVK (n=200)		CZ (n=200)		All (n=400)	
	MAS	new MAS	MAS	new MAS	MAS	new MAS
Conformity (S1)	-0,026	-,163*	-0,086	-,210**	-0,042	-,184**
Tradition (S1)	0,089	0,014	0,043	-0,043	0,066	-0,015
Benevolence (S1)	-0,08	-,143*	-0,072	-,155*	-0,051	-,140**
Universalism (S1)	-0,065	-0,127	-0,048	-0,131	-0,049	-,127*
Self-direction (S1)	-0,121	-,190**	-,152*	-,238**	-,123*	-,209**
Stimulation (S1)	0,016	-,200**	-0,13	-,304**	-0,062	-,253**
Hedonism (S1)	-0,001	-,206**	-0,075	-,211**	-0,018	-,201**
Achievement (S1)	-,153*	-,417**	-,199**	-,359**	-,194**	-,393**
Power (S1)	-0,025	-,280**	-,247**	-,379**	-,130**	-,329**
Security (S1)	0,03	-0,07	0,001	-0,079	0,027	-0,069
Self-transcendence (S2)	-0,084	-,156*	-0,065	-,150*	-0,054	-,144**
Self-enhancement (S2)	-0,094	-,375**	-,239**	-,400**	-,174**	-,393**
Conservation (S2)	0,049	-0,078	-0,009	-0,123	0,03	-,099*
Openness To Change (S2)	-0,034	-,245**	-,155*	-,318**	-0,088	-,282**

Legend: * $p < .05$, ** $p < .01$

Likewise, these new models put forward in regression analyses were now able to explain a much higher percentage of variance in Masculinity. After entering the same predictor variables as with the original Masculinity score, the model with the best fit contained only Achievement ($\beta = -.33$, $p<.001$) and Conformity ($\beta = .116$, $p=.018$), explaining 14.6% of variance ($R^2 = .146$, $F_{(2,397)}=34.07$, $p<.001$). Since we were mainly interested in both Achievement and Power, we also looked at the model when Power was added. When Conformity was replaced with Power, the model explained 14.4% of variance, i.e. virtually identical amount as with Achievement and Conformity ($R^2 = .144$, $F_{(2,397)}= 33.27$, $p<.001$). Namely, Achievement ($\beta = .282$, $p<.001$) and Power ($\beta = .128$, $p=.039$) significantly predicted the new Masculinity values. For second-order values, there was only one fitting model ($R^2=.14$, $F_{(1,398)}=64.63$, $p<.001$), with Self-enhancement explaining 14% of total variance in the new Masculinity ($\beta =.374$, $p<.001$).

In addition to regression analyses, we also conducted more conservative multiple regression analyses with the new Masculinity score and Schwartz's value types, which partly confirmed these results. Again, the models improved significantly, with both being statistically significant this time (SK: $F_{(10,189)}=4.098$, $p<.001$, CZ: $F_{(10,189)}=3.730$, $p<.001$). For Slovakia, Achievement was a significant predictor of the new Masculinity score ($\beta=-.349$, $p<.001$). In contrast to simple correlations, Power was not associated with Masculinity anymore ($\beta=-.050$, $p=.605$). For the Czech Republic, none of the values correlated with the new Masculinity, although there was a trend for Power at $p<.01$ ($\beta=-.190$, $p=.084$). Also, the percentage of explained variance has now more than doubled, although still remaining fairly low (SK 17.8%, CZ 16.5%).

Lastly, a general point pertains to the results of the PVQ questionnaire. In general, individuals differ substantially in the importance they attribute to the ten values put forward by Schwartz. Across societies, however, Schwartz (2006) notices surprising consensus regarding the hierarchical order of the values. The positions of self-transcendence to self-enhancement values and of openness to change to conservation values are supposed to be universally present. Across representative samples, using different instruments, the importance ranks for the ten values are also quite similar. Benevolence, universalism, and self-direction values are most important. Power and stimulation values are least important (Schwartz, 2006). The same distribution was (with minor discrepancies) replicated in both samples of our study (see *Table 1*).

Discussion

We have employed three strategies to investigate why there are differences in Hofstede's Masculinity index between Czechs and Slovaks. Overall, the evidence suggests that demographic factors such as religious affiliation, gender and residence size were not major predictors of these differences. Rather, it was a single item (no. 8) on the VSM 2013 questionnaire.

After minimizing the influence of this item on the MAS score, we found that not only did the large difference between Masculinity in Czechs and Slovaks disappear, but also that Masculinity was now better accounted by the two Schwartz's values that we have predicted based on theoretical grounds: Achievement and Power. What remains to be discussed is whether the differences in item 8 are merely an artefact of the instrument (e.g. Czech and Slovak participants understood the item in systematically different ways) or whether this item taps into real and profound differences in Czech and Slovak cultures. In the following, we will comment on this issue, as well as on some of the other partial findings of this study.

Demographics, a weak predictor of Masculinity

The analysis of the Masculinity index in relation to demographic variables such as gender, age, education, religious affiliation and size of place of residence did not lead to any findings that would support our hypotheses about their relationships. We anticipated gender differences in MAS in our sample as Masculinity is (by definition) higher in males (Hofstede, 2001). Unexpectedly, once split by nation, only gender differences within the Slovak sample remained statistically significant, although relatively weak. Hence, differences in MAS between Czech men and women are lower in relation to Slovak men and women – notably, Czech women achieved higher MAS score than Slovak women. The same relationship between Masculinity and gender was observed regardless of whether we calculated it with or without item 8. Needless to say, all the observed effects were rather weak.

Hofstede (2001) connects higher MAS to populations with a Catholic tradition, and our results confirm this expectation. Religiosity represents one of the most remarkable demographic distinctions between Czechs and Slovaks, with Czechs ranking third in the Global Index of Atheism (Win Gallup International, 2012) and Slovaks characterized by a high proportion of religiously affiliated population, predominantly Catholic (Bunčák, 2001).

Nevertheless, our data does not confirm Hofstede's implicit formulation about the relation of atheism with Femininity. In the Czech sample, no significant relation was found while Slovaks demonstrated the opposite tendency – religiously non-affiliated individuals were scoring significantly higher in MAS, regardless of how it was calculated (with or without item 8).

We also found significant differences in MAS according to the size of the place of residence, although exclusively in the Slovak sample. The highest scores were recorded from participants from small villages and the lowest from participants residing in larger towns.

A tentative explanation points to a historical context, in which Czechs, due to a German heritage law where the oldest child inherited land and property, witnessed the process of mass urbanization earlier in history. Slovaks, on the other hand, stayed connected to the land, which was divided to all members of the family. This delayed the development of cities, crafts and independent trade, relatively to Czechs who were more exposed to the development of urban culture (Lipták, 2011), which possibly stressed the importance of competition and individual achievement, in the past. Our historical explanatory hypothesis perceiving Slovaks in settings of close connection with land, well-defined masculine role and tradition, is congruent with the findings according to which Tradition together with Achievement was one of two dimensions with largest margin of difference between Czechs and Slovaks in the study of Ilgová and Ritomský (2009).

Instrumental adjustment

The lack of a solid explanatory structure after analysing the demographic factors and executing across-conceptual comparison (Hofstede-Schwartz) led us to focus on particular components of Hofstede's MAS scale.

VSM13 is a relatively new version used in a limited number of published studies so far; as a consequence, a limited number of references is available and none of those reaches item level. In addition, we did not have access to item loadings. Therefore, we decided to neutralise the influence of a single item, which was (a) the one where samples differed the most in their responsive tendencies, and (b) reported by Ripková and Masaryk (2015) as ambiguous in terms of interpretation of its meaning by both Czech and Slovak students. Our intervention has made Hofstede's and Schwartz's frameworks more congruent in the expected directions, even though the overall explained variance was still rather small – below 20 percent.

This particular finding offers support to the assumption that the validity of differences in Masculinity between Czechs and Slovaks as measured by Kolman et al. (2003) and Bašnáková et al. (2016) is, at least in part, influenced by either a) methodological artefacts (instrumental validity) or b) construct bias (see below). Both deserve closer examination.

Concerning instrumental validity, we believe that it is unlikely that we introduced any significant bias due to translation as the questionnaire was subjected to a precise double translation procedure. We also do not expect our samples to manifest distinct response styles as for instance reported between the Japanese, North Americans and Nigerians by van de Vijver and Leung (1997).

Assessing whether these differences stem from lack of construct validity/bias is a more intriguing question. Item number 8 refers to the importance of “living in a desirable area when considering an ideal job”, and in its content it somehow ambiguously refers to both quality of life representing femininity, and social status that is closely linked to masculinity. The formula for computing the index treats this item as “feminine”; the other three items making up the index are “Get recognition for good performance“ (item 3, Masculine), “Have chances for promotion“ (item 10, Masculine) and “Have pleasant people to work with“ (item 5, Feminine). However, item's 8 position within the context of “imagine an ideal job” makes it quite ambiguous for the participants to discern between these two options, because “desirable” could be read as “desirable from the society's point of view, i.e. a good address” or “desirable from a

personal point of view, i.e. where I experience high quality of life". Is it possible that the Czechs and Slovaks (or central European countries in general) might find this item more ambiguous than other nationalities? It might be, since understanding the items in context of either "status" or "quality of life" could be in part influenced by their cultural world-views. In post-communist societies, location of residence can actually represent valid reference to class membership, and therefore social status, as in any other country. On the other hand, during the socialist era, properties were routinely allocated based on other criteria than social class (e.g. party membership, ethnicity) and this might also have implications up till today – adding a certain degree of ambiguity to the meaning of an item at least at the level of social representations.

Currently, we have no direct evidence to support this tentative explanation, even though one aspect of our data could be informative: Czechs and Slovaks have both high scores on item 8 in comparison to the Dutch (our control group), as well as much higher standard deviations. This suggests that there is a more homogeneous understanding of the item content among the Dutch population, while Czechs and Slovaks seem to be similarly divided in their interpretations between Masculine and Feminine reading of item 8.

Study limitations

Even though the two samples were representative of their respective populations, adding more participants could provide us with further insight into the Masculinity index; for example by allowing us to perform more detailed and sophisticated statistical analyses of the data split by the demographic variables. Adding more cultures to our data pool would broaden our referential frame. Opting for a random sample instead of relying on TNS participant panel could potentially improve the validity of our findings, as people who are willing to cooperate with polling agency may represent a specific part of the population.

Conclusion

In this study, we attempted to explain the differences between Czechs and Slovaks in Hofstede's dimension of Masculinity in several different ways: through reference to underlying demography, another cultural framework of Schwartz's value types, and by instrumental adjustment, e.g. neutralising the influence of an item which proved to be ambiguous between a masculine and a feminine reading. Our findings are best explained by reference to this problematic item, which calls into question the validity of the Masculinity dimension.

The main contribution of our study is that we highlight the theoretical possibility that while the dimension of Masculinity might be culturally universal, the items devised to measure it could have culture-specific content. This has potentially far-reaching consequences for future uses of the Cultural Values Survey model. As we show in our analysis, it is advisable not to take large differences on CVS between countries – especially geographically and culturally close ones - at face value, but to employ additional "checks" by referencing results to other cross-cultural frameworks, such as Schwartz's PVQ.

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Trust in People and Attitudes Towards Immigration

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Abstract:

We use data from the European Social Survey (ESS) Rounds 1-7 to investigate the relationship between trust in people and attitudes towards immigrants and immigration. Our analysis is based on large longitudinal comparative survey data (ESS), where the immigrant attitudes are operationalized by two groups of items: the attitude toward immigrants (“To what extent do you think [country] should allow people of the same race or ethnic group as most of [country]’s people to come and live here?”; “To what extent do you think [country] should allow people of a different race or ethnic group as most of [country]’s people to come and live here?”; “To what extent do you think [country] should allow people of poorer countries in Europe to come and live here?”) and the attitude toward immigration (“Would you say it is generally bad or good for [country]’s economy that people come to live here from other countries?”; “Would you say that [country]’s cultural life is generally undermined or enriched by people coming to live here from other countries?”; Is [country] made a worse or a better place to live by people coming to live here from other countries?”).

We constructed a structural equations model comprised of three intercorrelated latent variables. Each latent variable was supported by three items from the ESS questionnaire. Latent variables represented factors and factor loadings for all items that were higher than 0.65, suggesting satisfactory factor stability for all three factors.

These results show that the questions in the ESS questionnaire that targeted respective attitudes and values (immigrants, immigration, trust) are consistent and that each triplet measures a common underlying factor.

We performed structural equations modelling (SEM) with three latent variables – attitudes towards immigrants, attitudes towards immigration and trust in people. We studied the correlations between the variables. The model fit for this model was satisfactory. RMSEA was 0.028, and CFI was 0.995.

In the second step, we performed a multi-group SEM analysis. We introduced 32 groups, with each group representing data from one country. First, we tested an unconstrained model. We obtained 32 triplets of correlations. The fit of this model was satisfactory. RMSEA was 0.006, and CFI was 0.992.

The strengths of the correlations varied, but all of the correlations had matching signs. Additionally, in every country, the correlation between attitudes towards immigrants (F1) and attitudes towards immigration (F2) was always the highest of the three in absolute terms. The correlation between attitudes towards immigration (F2) and trust in people (F3) was the second highest, and the correlation between attitudes towards immigration (F1) and trust in people (F3) was always the lowest. We confirm the significance of every one of the three correlations and discuss the possible factors behind these differences.

This indicates a consistent pattern of relationships between the three latent variables across the wide range of countries and adds strength to our finding that levels of trust in people are universally related to attitudes towards immigrants and immigration.

We then put constraints on every correlation coefficient to see whether the countries differ significantly in the strengths of correlations. We built three models, forcing covariances between pairs of latent variables to be equal across the countries, and compared the models using the Chi square test. All three models compared to the unconstrained model had $p < 0.001$, indicating significant differences between the constrained and the unconstrained models. We can conclude that there are significant differences in correlation strengths among the countries.

Our analysis shows that although correlation signs and strengths are consistent among people in various countries, significant differences remain in terms of how strongly trust in people and attitudes towards immigrants and immigration are correlated. When we look at an ordered list of the countries according to the strength of correlation between attitudes towards immigration, we find that countries with higher correlations are mostly "older" countries of the EU like Germany, Italy, Belgium, the Netherlands and France. Countries with lower correlations include countries that are not in the EU (Turkey, the Ukraine) or countries that joined the EU later (Estonia, Lithuania, Croatia, Bulgaria). We can hypothesize that immigration is not perceived as emotionally in the countries that joined later (most of the data have been collected before the current migration crisis); therefore, the fear of immigrants may not be as intense, and the correlation with the underlying factor of feeling secure is not as high.

Keywords:

Attitudes. Immigration. Trust in people. Structural equation modeling.

Introduction

In 2015, according to the International Organization for Migration (IMO), the number of migrants was the highest ever recorded, reaching 244 million. Previous estimates were 150 million in 2000 and 214 million in 2010. The results of Gallup's World Poll survey carried out for the IMO (Esipova et al., 2015), based on interviews conducted between 2012 and 2014 with over 183,000 adults from more than 140 countries, were different from the prevailing negative perceptions of migration in the media highlighting that, "people are more likely to want immigration levels in their countries to either stay at the present level or to increase, rather than to decrease - with the important exception of Europe" (2015, p. 1).

Hainmueller & Hopkins (2013, p. 2), in their review that included approximately one hundred studies on immigration attitudes, recognize two broad traditions: the first tradition, called the "political economy", explains immigration attitudes "with reference to native-born citizens' individual self-interest" and focuses on topics such as labor market competition and the fiscal impacts of immigration. The second tradition, called "socio-psychological", is less unified than the previous tradition and "emphasizes the role of group-related attitudes and symbols in shaping immigration attitudes". Immigrants, seemingly *different* from the native population's perspective, are particularly easy targets for ingroup – outgroup stereotypes and prejudices. However, this does not always mean that positive sentiments toward ingroup features are automatically inversely accompanied with hostility toward outgroup features, as proposed by Sumner (1906) and his predecessors (Bizumic, 2014).

Brewer's (1999, p. 433) review of findings from both cross-cultural research and laboratory experiments, based on Allport's (1954) recognition, argues that humans, "as a species have evolved to rely on cooperation, rather than strength, and on social learning rather than instinct as basic adaptation". When contact becomes regular (Intergroup Contact Theory, Pettigrew, 1998; Pettigrew & Tropp, 2006), the levels of acceptance become higher. Despite these expectations, the relationships among the majority of immigrants obviously incorporates a serious extent of rivalry and competitiveness, consistent with the propositions of Sherif's Realistic Conflict Theory (1953) and Tajfel's Social Identity Theory (1979). In addition, some amount of thoughtfulness is moderated by the level of perceived cultural similarity as expected

according to the Belief Congruence Theory (Rokeach, Smith & Evans, 1960) and the Terror Management Theory (Solomon, Greenberg, & Pyszczynski, 1991).

The “constrict theory”(Putnam, 2007) is more straightforward, and states that ethnic diversity (Putnam used US data), especially with targets that are immigrants, may foster social distance to the point of isolation and reduce trust among the ethnically dissimilar populations and also among homologous communities and their corresponding neighbors. Although Lancee & Dronkers (2008) confirmed Putnam’s hypothesis in a large sample of respondents in the Netherlands, Gesthuisen, van der Meer & Scheepers (2009) did not find support for this proposition in their analyses based on Eurobarometer 62.2/2004 data collected in 28 European countries. Instead, they found that economic inequality and a national history of democracy were more important in the explanation of cross-national differences. Hooghe et al. (2009) also did not confirm the negative effect of ethnic diversity on generalized trust in their analyses based on ESS (European Social Survey) data combined with OECD (Organization for Economic Co-Operation and Development) data from 20 European countries.

Our analysis is based on large longitudinal comparative survey data (European Social Survey, ESS), where the immigrant attitudes are operationalized by two groups of items: the attitude toward immigrants (“*To what extent do you think [country] should allow people of the same race or ethnic group as most of [country]’s people to come and live here?*”; “*To what extent do you think [country] should allow people of a different race or ethnic group as most of [country]’s people to come and live here?*”; “*To what extent do you think [country] should allow people of poorer countries in Europe to come and live here?*”) and the attitude toward immigration (“*Would you say it is generally bad or good for [country]’s economy that people come to live here from other countries?*”; “*Would you say that [country]’s cultural life is generally undermined or enriched by people coming to live here from other countries?*”; *Is [country] made a worse or a better place to live by people coming to live here from other countries?*”).

In our study, we will concentrate on the connection between trust in people and attitudes towards immigrants. Smith’s (2010, p. 455) review of the contributions to the concepts of moral philosophers, political scientists, psychologists, and sociologists reveals three primary conceptualizations: generalized, particularized, and strategic trust. In the ESS questionnaires (like in the General Social Survey or the World Values Survey), generalized (social) trust is the object of interest. Rotter called it “interpersonal trust” and defined it as “a generalized expectancy held by an individual who the word, promise, oral or written statement of another individual or group can be relied on” (Rotter 1980, p. 1). The usual means of measuring generalized trust represents the direct question; whether people can be trusted. The first systematic critique of this method of measurement (Glaeser, Laibson, Scheinkman, Soutter, 2000) came from the discovery that behavior in a trust game did not correspond with survey measures of trust. Several replications of this study engendered arguments either for or against this result and also prompted efforts to improve the measurement (Naef, Schupp, 2009). To cope with the problem, generalized trust in people in the ESS core module questionnaire is approached from three different perspectives:

“Generally speaking, would you say that most people can be trusted, or that you can’t be too careful in dealing with people? Please tell me on a score of 0 to 10, where 0 means you can’t be too careful and 10 means that most people can be trusted.”

“Do you think that most people would try to take advantage of you if they got the chance, or would they try to be fair? Please tell me on a score of 0 to 10, where 0 means that most people would try to take advantage on you and 10 means that most people would try to be fair”.

“Would you say that most of the time people try to be helpful or that they are mostly looking out for themselves? Please tell me on a score of 0 to 10, where 0 means that people mostly look for themselves and 10 means that people mostly try to be helpful”.

Method

Participants and procedure

We used data from the European Social Survey, particularly the ESS1-7 cumulative file. The sample for the present study included adults (individuals aged over 15) in representative samples from 32 countries. In total, the sample consisted of $N = 331,871$ individuals who participated in 7 rounds of the ESS between the years 2002 and 2014. The mean age was 47.7 years (standard deviation [SD] = 18.58), and 46% of the participants were male.

Measures

Attitudes towards immigrants. Participants were asked about their beliefs according to the 3 statements described above using a 4-point response scale (1 = allow many; 2 = allow some; 3 = allow few; 4 = allow none). The Cronbach's α reliability coefficient of this 3-item scale was 0.872.

Attitudes towards immigration. Participants were asked about their beliefs according to the 3 statements described above using an 11-point response scale (e.g., “Would you say it is generally bad or good for [country]’s economy that people come to live here from other countries?” where 0 = bad and 10 = good). The Cronbach's α reliability coefficient of this 3-item scale was 0.851.

Trust in people. Participants rated the 3 statements described above using an 11-point response scale. The Cronbach's α reliability coefficient of this 3-item scale was 0.780.

Data analysis

Structural equation modeling is a multivariate method that enables researchers to conduct a more precise analysis of the data than linear regression or factor analysis. SEM uses latent variables to account for measurement errors and allows for the simultaneous evaluation of multiple relationships in the model, which is not possible using linear regression.

We used the maximum likelihood estimation method to estimate the parameters of the model. We did not modify any parameters to improve the fit of the model. For the model fit, we used CFI and RMSEA indices. We did not use Chi square statistics for the model fit because of the large sample size. We did not exclude any data from the original sample and did not modify the original ESS dataset in any way.

We used multi-group modeling to allow data from different countries to be handled independently. We did not differentiate between rounds because every round was administered to a different set of respondents.

Results

We constructed a structural equations model comprised of three intercorrelated latent variables. Each latent variable was supported by three items from the ESS questionnaire. Latent variables represented factors and factor loadings for all items that were higher than 0.65; suggesting satisfactory factor stability for all three factors. Individual factor loadings are shown in Figure 1.

These results show that the questions in the ESS questionnaire that targeted respective attitudes and values (immigrants, immigration, trust) are consistent and that each triplet measures a common underlying factor.

We performed structural equations modeling (SEM) with three latent variables – attitudes towards immigrants, attitudes towards immigration and trust in people. We studied the correlations between the variables as depicted in Figure 1.

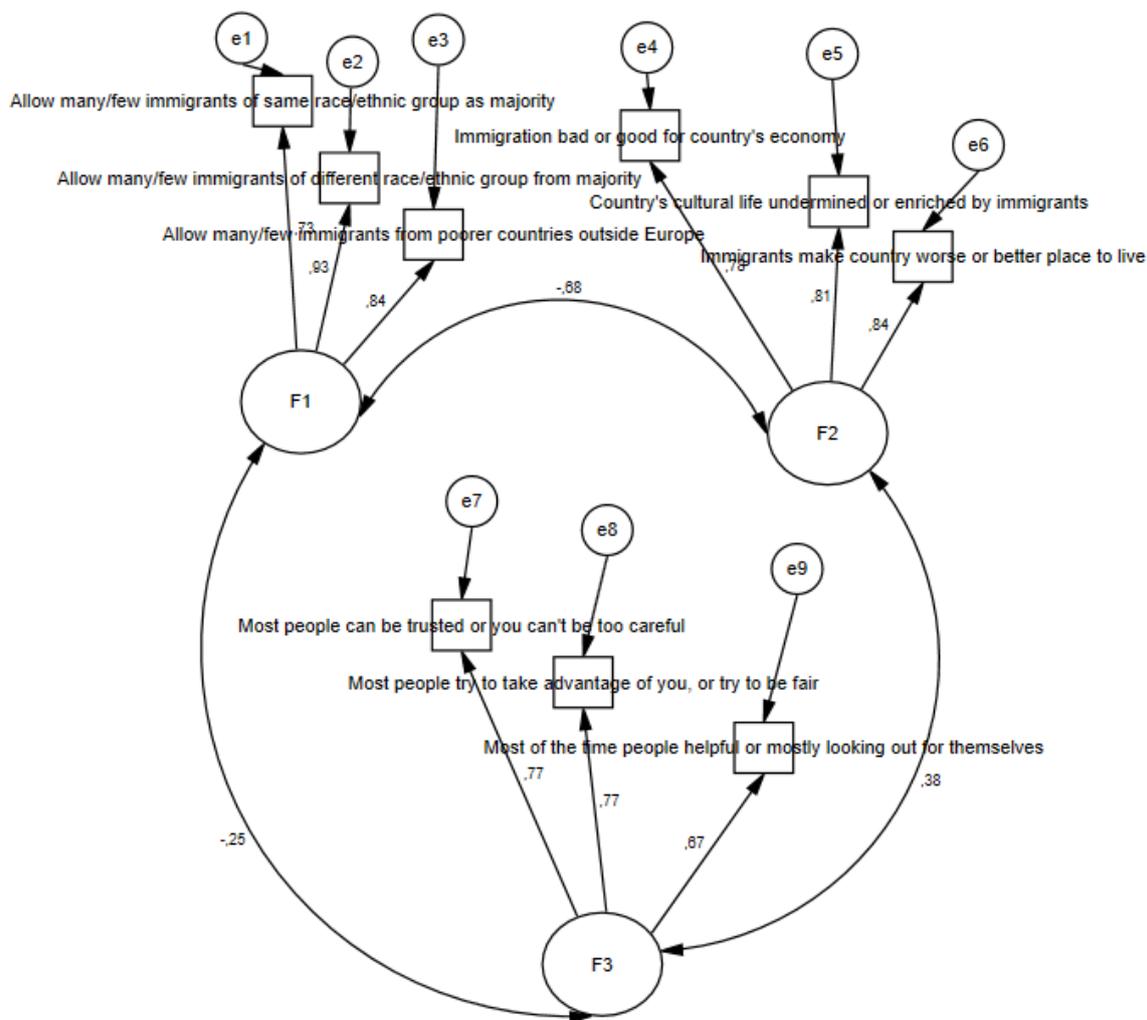


Figure 1: SEM model of the correlations between the three latent variables: attitudes towards immigrants (F1), attitudes towards immigration (F2) and trust in people (F3).

Correlations and factor loadings are shown in Figure 1. The model fit for this model was satisfactory. RMSEA was 0.028, and CFI was 0.995.

This shows a correlation between trust in people and the respondents' attitudes towards migrants and migration. These constructs correlate positively, meaning that lower levels of trust in people correlate with more negative attitudes towards immigrants and immigration. More negative attitudes towards immigrants correlate with more negative attitudes towards immigration. (Note that polarity of items differs.)

In the second step, we performed a multi-group SEM analysis. We introduced 32 groups, with each group representing data from one country. First, we tested an unconstrained model. We obtained 32 triplets of correlations as shown in Table 1. The fit of this model was satisfactory. RMSEA was 0.006, and CFI was 0.992.

Table 1: Correlations between latent variables for individual countries

Country	Correlation (sign)		
	F1/F2 (-)	F3/F2 (+)	F3/F1 (-)
AT	0.718	0.347	0.267
BE	0.731	0.441	0.293
BG	0.649	0.149	0.165
CY	0.647	0.346	0.203
CZ	0.677	0.310	0.184
DE	0.732	0.425	0.326
DK	0.680	0.388	0.248
EE	0.675	0.204	0.120
ES	0.653	0.313	0.207
FI	0.701	0.340	0.189
FR	0.753	0.389	0.283
GB	0.698	0.344	0.204
GR	0.677	0.274	0.206
HR	0.677	0.226	0.136
HU	0.654	0.359	0.234
CH	0.660	0.322	0.230
IE	0.631	0.311	0.207
IL	0.496	0.277	0.177
IS	0.669	0.343	0.179
IT	0.690	0.376	0.294
LT	0.572	0.308	0.133
LU	0.432	0.299	0.172
NL	0.625	0.423	0.284
NO	0.665	0.367	0.211
PL	0.600	0.260	0.171
PT	0.659	0.306	0.224
RU	0.642	0.321	0.214
SE	0.675	0.382	0.279
SI	0.665	0.368	0.248
SK	0.681	0.281	0.188
TR	0.599	0.154	0.075
UA	0.673	0.226	0.105

Country abbreviations: AT – Austria, BE – Belgium, BG – Bulgaria, CY – Cyprus, CZ – Czech Republic, DE – Germany, DK – Denmark, EE – Estonia, ES – Spain, FI – Finland, FR – France, GB – United Kingdom, GR – Greece, HR – Croatia, HU – Hungary, CH – Switzerland, IE – Ireland, IL – Israel, IS – Iceland, IT – Italy, LT – Lithuania, LU – Luxembourg, NL – Netherlands, NO – Norway, PL – Poland, PT – Portugal, RU – Russia, SE – Sweden, SI – Slovenia, SK – Slovakia, TR – Turkey, UA – Ukraine.

The strengths of the correlations varied, but all of the correlations had matching signs. Additionally, in every country the correlation between attitudes towards immigrants (F1) and attitudes towards immigration (F2) was always the highest of the three in absolute terms. The correlation between attitudes towards immigration (F2) and trust in people (F3) was the second highest, and the correlation between attitudes towards immigration (F1) and trust in people (F3) was always the lowest.

This indicates a consistent pattern of relationships between the three latent variables across the wide range of countries, and adds strength to our finding that levels of trust in people are universally related to attitudes towards immigrants and immigration.

We then put constraints on every correlation coefficient to see whether the countries differ significantly in the strengths of correlations. We built three models, forcing co-variances between pairs of latent variables to be equal across the countries, and compared the models using the Chi square test. All three models compared to the unconstrained model had $p < 0.001$, indicating significant differences between the constrained and the unconstrained models. We can conclude that there are significant differences in correlation strengths among the countries.

This implies that although there is an overall pattern of correlations between the three latent variables, there are significant differences between respective countries. In some countries, the trust and attitudes towards immigrants/immigration do not seem to correlate as strongly as in other countries.

Discussion and Conclusions

Some political scientists have described the post-Cold War world as a “clash of civilizations” (Huntington, 1996), where cultural and religious differences will become the primary source of conflict rather than economic and political interests; in particular between the Muslim and Western worlds. According to Inglehart and Norris (2003, p. 63), based on the World Values Survey 1995-2001 data, “Samuel Huntington was only half right. The cultural fault line that divides the West and the Muslim world is not about democracy, but sex. According to a new survey, Muslims and their Western counterparts want democracy, yet they are worlds apart when it comes to attitudes toward divorce, abortion, gender equality, and gay rights -which may not bode well for democracy's future in the Middle East”. It seems necessary to mention this because we need to consider that in the present wave of migration into Europe, the influx comes mostly from the Muslim countries of Northern Africa, the Middle East, Afghanistan, and Pakistan. In this context, the perceived cultural and religious differences between natives and migrants are especially visible and acute (Dummett, 2001).

The data from the European Social Survey provide an opportunity to test the interconnections between generalized trust in people and migrant attitudes on a large sample of adults from several countries over the course of a relatively long time period (2002-2014). Our results indicate a firm relationship between trust in people and attitudes towards immigrants and immigration. Similar research has been completed by Halapuu et al. (2013, 2017) regarding trust towards institutions and attitudes towards immigrants, but on a smaller data sample. These findings indicate that trusting people perceive immigrants more positively. We may hypothesize that an underlying factor of feeling secure may exist that enables people to trust and not to fear. Our analysis also shows that although correlation signs and strengths are consistent among people in various countries, significant differences remain in terms of how strongly trust in people and attitudes towards immigrants and immigration are correlated. When we look at an ordered list of the countries according to the strength of correlation between attitudes towards immigration, we find that countries with higher correlations are mostly “older”

countries of the EU like Germany, Italy, Belgium, the Netherlands and France. Countries with lower correlations include countries that are not in the EU (Turkey, the Ukraine) or countries that joined the EU later (Estonia, Lithuania, Croatia, Bulgaria). We can hypothesize that immigration is not perceived so emotionally in the countries that joined later (most of the data had been collected before the current migration crisis); therefore, the fear of immigrants may not be as intense, and the correlation with the underlying factor of feeling secure is not as high. Other authors (Hatton, 2017) advise that other factors be taken into consideration.

Historically, trust in people has essentially been built on close personal experience; we still typically trust our family members and friends more than strangers. Even though (as theorised back to Hobbes and Locke) the importance of trust in people was repeatedly emphasized as an essential part of civilization, in the process of civilization, “service industries” transfigure immediate interpersonal contacts on their impersonal/functional form in a step-by-step manner. Not surprisingly, considering the rapid process of urbanization (72% of the EU population live in cities), this way of social life is described as a community of strangers (Wirth, 1937; Baumann, 1993). The belief in whether strangers can be trusted or not is seemingly misleading, not only in the traditional sense, but also among other things because both are psychologically expensive; improper distrust is an equally corrosive force as improper trust. Despite the tendencies described above, our results confirm the lasting role of general trust in people as a “social compass” in a changeable world: *“Trust is the chicken soup of social life. It brings us all sorts of good things, from a willingness to get involved in our communities to higher rates of economic growth and, ultimately, to satisfaction with government performance, to making daily life more pleasant. Yet, like chicken soup, it appears to work somewhat mysteriously. It might seem that we can only develop trust in people we know. Yet, trust’s benefits come when we put faith in strangers”* (Uslaner, 2002, p. 1).

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Fear of poverty – verification of its relationship to socio-economic status and selected personality variables

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Abstract:

In psychology literature, the interest in poverty is traditionally represented by two constructs – poverty attributes (Feagin, 1972; Heider, 1958) and the attitudes to poverty (Cozzarelli, Wilkinson, & Tagler, 2001). The present study proposes the concept of "the fear of poverty", which appears to be accessible to psychological research. In addition, based on the information from various transnational surveys (such as Eurobarometer), the concept presents the present reality for a considerable part of the Slovak population.

When analyzing the fear of poverty, there are two ways of conceptually understanding this. One represents the view that the fear of poverty can be a manifestation of a more general personality trait, which predisposes the person to uncertainty and fear of future material shortage. In this way, the fear of poverty could be relatively independent of the person's situation. The other possibility is to consider the fear as the emotional consequence of the person's unfavorable economic or social situation.

Due to the absence of relevant literature sources addressing the fear of poverty, the present research is of an exploratory nature.

Research objective: The aim of the research was to examine the relationship between the indicators of socio-economic status (financial stress, education, employment status) and selected personality traits (neuroticism, extraversion, conscientiousness) to the fear of poverty. Within the examined socio-economic variables, the hypothesis of a positive relationship between financial stress and the fear of poverty was formulated. We made the assumption that the unemployed and less-educated people would exhibit a higher level of the fear of poverty. Furthermore, we hypothesized a negative relationship between extraversion and the fear of poverty and a positive relationship of neuroticism and conscientiousness to the fear of poverty.

Research method: A total of 115 respondents aged 18-62 ($M = 32.35$; $SD = 11.16$) participated in the survey, consisting of 58 men and 57 women. The respondents were from the Košice region.

To determine the level of the fear of poverty, the authors' 11-point answer scale was used. At the same time, an item with a "I have a / I have no fear of poverty" dichotomous response scale was included in order to validate the assessment of the fear of poverty. Selected personality traits (neuroticism, extraversion, conscientiousness) were assessed using the NEO-FFI five-factor personality inventory subscales (Ruisel & Halama, 2007). Financial stress was measured using the Financial Stress Questionnaire (Bačíková-Slešková et al., 2007). Finally, *highest level of education achieved* and the *current employment status* were included in the socio-demographic questionnaire.

Results and Discussion: In order to assess the fear of poverty, a simple form of an 11-point answer scale was used. This way, the respondents could express different levels of the assessed variable in a more sensitive way than with the dichotomous scale. At the same time, the 11-point answer scale differentiates better between those participants who claimed they are afraid of poverty and those who claimed they are not. A multiple hierarchical linear regression analysis (the stepwise method) was carried out to examine the relationship of the indicators of socio-economic status (financial stress, education, employment status) and selected personality traits with the fear of poverty. The results of the analysis showed that within the examined personality traits, neuroticism was a significant predictor of the fear of poverty; explaining 6% of variance in the dependent variable. Out of the selected indicators of socio-economic status, financial stress (24%) and employment status (5%) became significant predictors. Based on these findings it can be stated that employees with higher levels of financial stress and neuroticism showed a higher level of the fear of poverty. No relationship between the other variables and the fear of poverty was present. On the basis of the findings, it cannot be clearly understood if the fear of poverty results from a person experiencing an unfavorable socio-economic situation or, rather, due to a personality trait. As a possible hypothesis explaining the relationships of these variables, a mediation model could be designed. In such a model, the relationship between socio-economic status and the fear of poverty would be mediated by personality variables and particularly by the neuroticism of a person; which shows the relationship to financial stress ($r = -.45$) as well as to the fear of poverty ($r = .49$). For this type of analysis, however, more extensive research is needed, especially in relation to the sample size. **Conclusion:** In the present research, the hypotheses about the relationship between personality variables (neuroticism in particular) and the indicators of socio-economic status (financial stress) to the fear of poverty was confirmed. Moreover, another hypothesis about the assumed interrelationship between them was formulated. The research carried out was the first attempt (at the national level) to explore the issue of the fear of poverty with a focus on psychological variables, and thus aimed at enriching the knowledge base in an area which has traditionally been dominated by economic and social sciences.

Key words:

Fear of poverty. Personality traits. Socio-economic status.

Theoretical Background

In 2016, the daily newspapers (SME, Dnes24, Pravda, and others.¹) published a survey (conducted for Pioneer Investments by the Stem Mark company) which drew attention to the fact that nearly seven out of ten Slovaks are afraid of financial stringency and poverty, and more than half of the sample of 500 respondents feel uncertainty and the fear of long-term poverty. These concerns are greater than the fear of terrorism, long-term illness or an immigration crisis in Slovakia. Similarly, the regularly conducted Eurobarometer survey addressing the concerns of the European Union (EU) citizens, including Slovakia, asked about the two most important current issues; with the economic situation as one of the options. 19% of Slovaks chose this option, which is a smaller percentage compared with the fear of unemployment (34%) and health and social security (33%), but is still a relatively high proportion (European Commission, 2016)².

The issue of poverty is not traditionally explored within the psychological sciences, as it is more often understood as an objective category which is more at the center of interest of sociology or economics. Deficiencies in conceptualizing poverty as an objective category – poverty independent from the opinion of the person being assessed - led to the introduction of other concepts representing the expression of a person's own experience; labelled as

¹ <https://ekonomika.sme.sk/c/20250846/slovaci-sa-obavaju-najma-financnej-tiesne-a-chudoby.html>;

<https://www.dnes24.sk/slovakov-ovlada-strach-ze-ostanu-bez-penazi-a-chudobni-248171>;

<https://spravy.pravda.sk/ekonomika/clanok/403001-slovaci-sa-obavaju-najma-financnej-tiesne-a-chudoby/>

² For comparison with the previous survey, the results from the 2016 survey are presented. More recent findings are similar, with 20% in the spring of 2018 and 15% in the autumn of 2018, see <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/index#p=1&instruments=STANDARD>

subjective poverty or the subjective limit of poverty (Mareš & Rabušic, 1996; Sirovátka & Večerník, 2002). These are, however, used rather in the economic and sociological sciences. The most commonly used constructs that comprise the specific psychological dimension of poverty are the attributions of poverty that express people's beliefs about the cause of a person's poverty (Feagin, 1972; Heider, 1958) and the attitudes to poverty (Cozzarelli, Wilkinson, & Tagler, 2001). However, the above-mentioned issue of the fear of poverty is not identical to those constructs and represents an area open to psychological research.

In a very simplified way, there are two ways of conceptual appreciation when analyzing the fear of poverty. Firstly, the fear of poverty can be a manifestation of a more general personality trait predisposing the person to uncertainty and fear of future material want. In this way, the fear of poverty could be relatively independent of a person's situation. The other possibility is to consider fear as the emotional consequence of the person's unfavorable economic or social situation. These suggested possibilities for conceptualizing the concept of the fear of poverty allows for the psychological terms such as the "fear" of poverty or "anxiety" associated with the anticipation of poverty. Due to the lack of relevant literary sources, the present research is of an exploratory nature³, and, for the time being, the question of conceptualizing the construct of the fear of poverty cannot be adequately addressed with certainty yet. One of the aims of this paper is to get a better understanding of the "fear of poverty" concept and to look to ways of collecting empirical evidence explaining the properties of the construct.

It is not easy to examine the connection of various aspects of poverty and personality variables, as poverty is not uniformly defined and there are several different poverty indicators available. Within representative samples, Tharp (2012) proved a positive relationship between extraversion and financial satisfaction and a negative relationship between conscientiousness and financial satisfaction at the national level. At the individual level, he noted a positive relationship with extraversion and a negative relationship with neuroticism and satisfaction to financial satisfaction. Larsson and Sevä (2012) examined the personality traits of the poor and found a lower score of extraversion, conscientiousness and openness to experience, and a higher score of neuroticism and satisfaction. It is, however, important to note that the cited sources are not from the psychological field.

Regarding impact, poverty produces stress and other negative affective states that lead to short-sighted decision-making and unwillingness to take risks (Haushofer & Fehr, 2014). The more elaborated mechanism of the consequences of poverty, or the theoretical model of why poverty perpetuation occurs, was outlined by Adamkovič and Martončík (2017). The authors hypothesize the way poverty creates a heavy cognitive load (negative affect and stress), which is subsequently reflected in deteriorated executive functions, tendencies to impulsive behaviors and subsequent (objectively) less favorable economic decision-makings. Thus, this leads to a cycle of poverty perpetuation and repeatedly causes negative affects or stress. Poverty-related concerns exhaust one's mental reserves (Mani et al., 2013). All of this can lead to the more frequent experiencing of negative emotions and a negative attitude to one's own future. Several other studies show the link between poverty and depression (Denny et al., 2004; Heflin & Iceland, 2009; Najman et al., 2010; Spence et al., 2002).

³ Entering the key word „fear of poverty“ into the Web of Science database brought six results by the end of 2018. Most of these six sources came from fields other than social sciences and thus not applicable for the use in our research. Similar results were obtained when entering the modifications of the key word.

The aim of the research was to examine the relationship between the selected indicators of socio-economic status (financial stress, education, employment status) and selected personality traits (neuroticism, extraversion, conscientiousness) to the fear of poverty. The following hypotheses were formulated based on a theoretical basis and the stated goal:

H1: We hypothesize a statistically significant relationship between socio-economic status and the fear of poverty. Specifically:

H1.1: there is a positive relationship between financial stress and the fear of poverty,

H1.2: the unemployed and low-educated people exhibit a higher level of the fear of poverty.

H2: We hypothesize a statistically significant relationship between selected personality traits and the fear of poverty. Specifically:

H2.1: there is a negative relationship between extraversion and the fear of poverty,

H2.2: there is a positive relationship of neuroticism and conscientiousness to the fear of poverty.

Research Method

Research sample

To get a preliminary insight into the topic a sample of 115 respondents was selected by occasional convenience sampling method. The respondents were from the Košice region and consisted of 58 men (50.4%) and 57 women (49.6%) aged 18-62 ($M = 32.35$; $SD = 11.16$). Among them, 78 people were unmarried (67.8%) and 37 people were married (32.2%), and 78 people were employed (67.8%) and 37 people were unemployed (32.2%). Their highest educational attainment was high school degree ($n = 51$; 44.3%) or university degree ($n = 64$; 55.7%).

Research instruments

The sociodemographic questionnaire investigated: age, gender, highest degree of education achieved, marital and employment status (employed/unemployed). At the same time, we also surveyed the number of people living in the household of the respondent, as well as the number of children under the age of 18 living in the household.

The Financial Stress Questionnaire (Bačíková-Slešková et al., 2007) is focused on a subjective assessment of one's own financial situation using four questions identifying the financial possibilities of respondents when undertaking certain activities. An example of an item/question being: "Have you recently experienced that you didn't have enough money to buy clothes you wanted?" With a respondent answering "yes" = 1 or "no" = 2. The higher the respondent scores, the lower financial stress they experience. In our research, one of the four items was modified; namely the item "go to the disco", which was replaced with "have dinner at a restaurant" due to the age distribution of the research sample. The questionnaire was evaluated by a summary score.

NEO-FFI (Costa & McCrae, 1992) is a five-factor personality inventory that was administered to measure three selected personality traits – extraversion, neuroticism, and conscientiousness. An example of an item in the extraversion subscale is: "I'm a cheerful, high-spirited person." Each of the subscales contains 12 items and the respondent assesses the validity of the statement on the 5-point response scale. The Slovak version of the instrument by Ruisel and Halama (2007) was administered.

To measure the fear of poverty, we used a one-dimensional scale with the instruction, "On the given scale, express the fear of your own poverty by circling a number from 0-10, where 0 means I have no fear and 10 means I have great fear." In order to validate the assessment of the fear of poverty, a response scale assessing the fear of poverty as a "I have / I have no fear of poverty" dichotomy was included in the questionnaire battery. A comparison of the different forms of the answer is displayed in the results section.

The test battery was administered to respondents individually between February and March 2018.

Results

The data was processed using the SPSS 18 statistical program. The normality of data distribution was verified using a skewness test. Since the data of financial stress variable did not have normal distribution, they were normalized by the method of exponentiation (after the adjustment, the skewness value was -.93; standard skew error .23). The descriptive characteristics of the examined variables are shown in Table 1.

Table 1: Descriptive analysis of the examined variables

	Min	Max	M	SD	Skewness	α
Fear of poverty	0	9	4.0	2.45	.44	-
Neuroticism	4	35	17.8	5.76	.31	.80
Extraversion	15	46	32.8	6.50	-.31	.80
Conscientiousness	17	43	31.0	5.65	-.16	.80
Financial stress	4	8	7.0	1.29	-1.16	.77
Financial stress normalized	16	64	51.1	16.3	-.93	.77

Note: Min – minimal value, Max – maximal value, M – mean value, SD – standard deviation, α – Cronbach's alpha

Table 2 illustrates the distribution of the fear of poverty that enables a comparison of the respondent's answers using the 11-point scale and dichotomized responses. When comparing the scaled responses in the dichotomous "I have fear" versus "I have no fear" group, it is possible to identify that the 11-point scale differentiates better among those who stated they are or are not afraid of poverty (different distribution of responses – Fisher's exact test got the value of 77.4 ***; alternatively, when comparing two frequency distributions, Kolmogorov-Smirnov test got the value of .76 ***).

Table 2: Scoring of the fear of poverty variable by two response formats

Fear of poverty:	I have no fear	I have fear
0 (no fear)	6	0
1	7	0
2	25	1
3	17	5
4	6	2
5	4	11
6	1	7
7	0	9
8	0	9
9	0	5
10 (great fear)	0	0
Total	66	49

In order to examine the relationship of selected personality traits and socio-economic status indicators (financial stress, education, employment status) to the fear of poverty, a multiple hierarchical linear regression analysis (stepwise method) was carried out. Prior to the regression analysis the collinearity diagnostics was performed. As a result, none of the selected predictors reached the tolerance value lower than 10, and at the same time the VIF did not exceed the value higher than 10. Based on this, all selected predictors were included in the analysis. The controlled variables were: age, gender, marital status, number of people in the household and number of children under the age of 18. The variables entered in the following blocks: block 1 comprised sociodemographic variables – age, gender, marital status, people in household and children under 18; block 2 consisted of financial stress, education, and employment status; and block 3 included personality variables – neuroticism, extraversion, and conscientiousness. The results of the regression analysis are presented in Table 3.

Table 3: Regression model for age, gender, marital status, number of people in the household, number of children under the age of 18, extraversion, neuroticism, conscientiousness, financial stress, education and employment status as criterion predictors of the fear of poverty (accepted models; $p < .05$)

Predictor	R	R ² -change	b	β	T	p
Fear of poverty ($F_{total}(3,111) = 21.575; p < .000$)						
financial stress – norm.	.511	.26***	-.061	-.408	-4.697	.000
employment status	.553	.05**	-.879	-.169	-2.172	.032
neuroticism	.607	.06**	.121	.285	3.315	.001
(Constant)			5.248			

Note: ** stands for $p < .01$, *** stands for $p < .001$. The fear of poverty ranges from 0 to 10; neuroticism ranges from 0 to 5; the high score in the stated variables indicates a strong construct measure; normalized financial stress ranges from 16 to 64: the low value indicates a strong construct measure and the high value indicates a weak construct measure. Employment status takes values 0 = employed and 1 = unemployed.

Regression analysis showed that out of the tested predictors, three predictors were significant; namely financial stress, employment status, and neuroticism, which together explained 37% of the fear of poverty variance. Financial stress explained 26% of the variance. The higher the level of financial stress respondents expressed, the higher the level of the fear of poverty they reached. Employment status explained 5% of the variance, and hence the employed showed a higher level of fear of poverty. Neuroticism contributed 6%, which means that people with a higher level of neuroticism showed a higher level of fear of poverty.

Discussion

The issue of poverty can be considered continuously topical in Slovakia. The fight against poverty is one of the strategic objectives of EU policies within the programming period set for the decade 2010-2020, despite the fact that in terms of the well-being of its citizens, the European area is incomparable with the countries traditionally struggling with poverty. This suggests that poverty has a culturally specific context and can also be present in economically developed countries. The issue of defining poverty goes beyond the aims of this study, especially because it is not primarily a psychological concept. In our research, we focused on the concept that reflects people's attitudes and expectations of what they consider to be poverty. Lacking the studies with a similar focus, the conducted research can be considered as the first attempt to examine the issue of the fear of poverty and its predictors.

Regarding the measurement of the fear of poverty, we chose a simple form of single-item questioning with an 11-point answer scale, meaningfulness of which was also verified by a simplified form of a question with two answer options. The values of the dichotomously assessed fear of poverty corresponded with the scaled values. At the same time, the distribution of scaled values of the fear of poverty covered almost the entire continuum with the exception of the extreme value of 10. The answers were not grouped around the extreme poles of the answer options and the use of the scaled form seems appropriate for a more sensitive differentiation of people's attitudes and expectations regarding their own poverty.

The aim of the research was to examine the relationship between two groups of predictors – personality traits (neuroticism, extraversion, conscientiousness) and socio-economic status indicators (financial stress, education, employment status) – and the fear of poverty in regression models. The results showed a significant positive relationship between neuroticism and the fear of poverty; however, no significant relationship of extraversion and conscientiousness to the fear of poverty was found. Neuroticism is a personality trait in the Big Five model, characterized as "a general tendency to experience negative affects" such as fear, threat, or frustration, as well as an inclination to negative psychological stress (Ruisel & Halama, 2007, p. 12). Out of the five components of personality, neuroticism is the most similar to the fears related to different aspects of life, including poverty. From this viewpoint, the observed finding is not surprising. Of the selected indicators of socio-economic status, financial stress and, to a lesser extent, employment status proved to be significant predictors. People with a higher level of financial stress also showed a higher level of the fear of poverty. Financial stress is used as a subjective indicator of a person's financial situation and in some cases it is considered more appropriate than other objective indicators of financial situation (Hagquist, 1998). Compared to neuroticism (6%), financial stress, with 26% of the explained variability of the dependent variable, represented a more significant predictor in the regression equation. An interesting finding was a small but significant contribution of employment status to the variability of the fear of poverty, which, unlike the previous two significant predictors, scored contrary to expectations. A higher score of the fear of poverty was recorded in the

employed. Due to the sample size and the pilot nature of the research we cannot formulate further interpretations of this finding, as further examination is required. Based on these findings it is difficult to decide unequivocally how to understand the fear of poverty; whether it results from experiencing an unfavorable socio-economic situation or it is rather a personality trait. As a possible hypothesis for explaining the relationships of these variables, it would be possible to construct a mediation model where the relationship between socio-economic status and the fear of poverty would be mediated by personality variables, and by the neuroticism in particular, since it has a relationship with both financial stress ($r=-.45$) and the fear of poverty ($r=.49$). However, more extensive research is needed for this type of analysis, especially with regard to sample size.

The conducted research has several limitations related mainly to the nature of this first attempt to examine the issue of the fear of poverty. From the methodological point of view, it is essentially the minimalistic research design with the occasional sampling method and the small sample of respondents with high school and university degree. The region the respondents come from or the duration of unemployment among unemployed respondents are the external variables which may interfere, and thus it is necessary to control them in any further study. Regarding the measurement of the fear of poverty, a simple method of single-item questioning with a both scaled and dichotomous form of response was chosen. For future research, it is advisable to collect a set of statements about the fear of poverty and try to construct a multi-item scale, where the psychometric parameters could be assessed better. However, for the time being, a single-item form of answer seems applicable in differentiating among respondents in terms of the fear of poverty.

Conclusion

The present research confirmed the hypotheses about the relationship of personality variables (neuroticism) and socio-economic status indicators (financial stress) to the fear of poverty. Moreover, we formulated another hypothesis about the anticipated relationship between them.

The concept of the fear of poverty appears to be a potentially interesting construct open to psychological exploration, which can – within the focus of social sciences – contribute to a better understanding of poverty in terms of its subjective reflection by a person themselves. The present research represents the first attempt (at the national level) to explore the issue of the fear of poverty, focusing on psychological variables in order to enrich the knowledge base in the area which has traditionally been dominated by economic and social sciences.

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Recenzie a anotácie
Reviews and Annotations

Človek a spoločnosť
Individual and Society

NOVÉ

KUSÁ, Zuzana. *Škola nie je pre všetkých*. Bratislava : Sociologický ústav SAV, 2016. 283 s. ISBN 978-80-85544-98-5

Vzdelanie predstavuje faktor, od ktorého závisí hospodársky vývoj krajiny. Preto nie je prekvapivé, že je predmetom viacerých spoločenských i politických diskurzov. Ukazuje sa, že napriek viacerým opatreniam, reformám, osvietene znejúcim vyhláseniam, právnym predpisom či úsiliu veľkého počtu inštitúcií sa prístupnosť vzdelávania pre všetkých javí ako spoločenský problém. Disparity na pôde vzdelávania a prístupu k nemu sa dostali do zorného poľa najmä vďaka integračným procesom do EÚ, a taktiež vďaka medzinárodným výskumným i monitorovacím projektom, akým je napr. zisťovanie PISA. Otázka integrácie a inkluzívneho vzdelávania je aj v centre monografie *Škola nie je pre všetkých*.

Koncepcia inkluzívneho vzdelávania sa začala rozvíjať v 90. rokoch 20. storočia, predovšetkým v anglo-amerických spoločnostiach. Myšlienky o inkluzívnom vzdelávaní môžeme považovať za akúsi nadstavbu integračných snáh, ktorých cieľom bolo vzdelávať všetky deti, pomocou špeciálnej intervencie.

Publikácia *Škola nie je pre všetkých* je syntézou výsledkov z dvoch výskumných projektov, ktorými sú projekt 7 RP č.217 384 *Etnické rozdiely vo vzdelávaní a nerovnaké vyhliadky mestskej mládeže v rozšírenej Európe* (EDUMIGROM) riešený v rokoch 2008 až 2011 a projekt VEGA 2/0157/14 *Sociálna inklúzia v škole v pohľade sociológie každodennosti (2014 – 2016)*. Oba projekty nazerali na inkluzívne vzdelávanie z dvoch pohľadov: vertikálneho a horizontálneho. Vertikálny pohľad pod inklúziou chápe také pedagogické postupy a metódy, ktoré sprístupňujú kvalitné vzdelávanie všetkým žiakom a rešpektujú ich osobitné vzdelávacie potreby. V horizontálnom pohľade je inklúziou taký charakter interakcií medzi učiteľmi a žiakmi a také vzory interakcií medzi žiakmi, ktoré v signalizujú prijímanie a rovnocennosť všetkých.

Monografia je členená do piatich kapitol: *Škola ako spoločenská súdržnosť, Hlasy a tváre školy, Každodenná školská práca, Neisté školské kariéry a Inklúzia ako prijatie*. Text monografie zachytáva aj rozmanitosť školského prostredia, a súčasne zrkadlí viaceré bariéry, ktoré bránia naplneniu princípu vzdelania pre všetkých. Hlavným cieľom autorky je priblížiť civilizujúci rozmer vzdelávania, pričom za jeho meradlo a meradlo civilizovanej a humánnej spoločnosti Z. Kusá považuje výchovu k tolerancii a schopnosti pochopiť, akceptovať a prijať druhých ako rovnocenné ľudské bytosti. Autorka tvrdí, že dnes sa na školstvo nazerá predovšetkým ako na priestor, kde sa deti resp. žiaci pripravujú na požiadavky trhu a ich ekonomické pôsobenie, pričom však často zostáva v úzadí práve civilizujúci rozmer vzdelávania, s ktorým súvisí vedenie študentov k morálnym hodnotám, slušnosti, k úcte, družnosti či kooperácii. Školské prostredie predstavuje jeden z prvých a možnože aj s posledných priestorov, kde sa môžu stretnúť a dostať do tesnej blízkosti deti z rôznych sociálnoekonomických či kultúrnych prostredí. V tomto priestore sa učia vnímať jeden druhého ako seberovných či rovnocenných. Autorka túto okolnosť chápe ako veľkú potenciú, ktorej využitie resp. nevyužitie môže mať aj negatívne dopady pre vývoj spoločnosti.

V úvodnej kapitole, *Škola ako spoločenská súdržnosť*, autorka vymedzuje sociologický, pedagogický a normatívny rámec, z ktorého následne vychádza. Inšpirujú ju najmä vzdelávacie koncepcie É. Durkheima a J. Deweyho. Školský priestor chápe ako arénu interakcií, teda ako interakčný priestor, v ktorom sa učíme úcte k druhým ľuďom a osvojujeme si hodnoty a pravidlá demokratického života. É. Durkheim si bol vedomý toho, že v industriálnych

spoločnostiach rastie potreba špecializovaného vzdelávania, avšak konštatoval, že následkom deľby spoločenskej práce sa vytvára podnet na spor medzi humanistickými a spoločenskými funkciami výchovy. Preto vo svojich dielach zdôrazňoval dôležitosť sekulárnej morálky. Zdôrazňoval, že deti a študenti by si mali počas svojho pôsobenia na akademickej pôde odniesť dve kľúčové myšlienky, ktoré sú predpokladom pre existenciu civilizovanej spoločnosti. V prvom rade ide o živé presvedčenie o vlastnej dôstojnosti, a následne ide o povinnosť sebaovládania, rešpektovania a tolerovania druhých. Podľa autorky učenie sa demokracii nespočíva len alebo najmä vo výkladoch a prednáškach vyučujúcich, ale je ovplyvnené aj typom a vzormi interakcie medzi učiteľmi a žiakmi a medzi žiakmi samotnými. Ak má školské prostredie prispievať k rozvoju demokratických zvyklostí i ľudskosti v zmysle vzájomnej empatie, potom toto interakčné prostredie musí byť charakterizovateľné ako priestor, v ktorom sa tieto zvyklosti uplatňujú každodenne.

V druhej kapitole, *Hlasy a tváre školy*, autorka oboznamuje čitateľa s teoretickými východiskami, výberom i popisom výskumných vzoriek a metodológiou oboch vyššie spomenutých výskumných projektov. Pojmový aparát, ktorý autorka využíva je vo veľkej miere ovplyvnený symbolickými interakcionistami, predovšetkým E. Goffmanom, C.J. Couchom a J. Turnerom. Autorka na problematiku interakcie a integrácie nazerá holisticky, teda nezužuje svoje skúmanie len na viditeľné interakcie či rozhovory s aktérmi o tom, ako školské prostredie reálne funguje, ale zohľadňuje danú problematiku komplexne. Pracuje s legislatívnym rámcom, analyzuje zdroje financovania základných škôl, a tiež neunikajú jej pozornosti podmienky dostupnosti asistenčných programov.

Jednou z kľúčových metód výskumu v rámci projektu VEGA bolo etnografické pozorovanie interakcií v školách a triedach, ktoré navštevujú žiaci s nerovnakými vzdelávacími potrebami či nerovnakým sociálnym a etnickým zázemím. Pre potreby naplnenia stanoveného cieľa bolo nutné nájsť také školy a v rámci nich triedy, v ktorých sú rôznorodé kolektívy žiakov, pretože v homogénnom školskom prostredí nie je možné skúmať integráciu a inklúziu. Až na jednu výnimku, v ktorej sa pozorovanie uskutočnilo v rámci pilotnej fázy projektu, jednotlivé školy boli vybrané z reprezentatívnej vzorky šiestych a deviatych tried 80 základných škôl, zapojených do zisťovania NÚCEM, a konkrétne výsledkov žiackeho dotazníka inklúzie, v ktorom žiaci uvádzali, či majú v triede „odlišných“ spolužiakov. Vo výskumnej vzorke sa teda prevažne nachádzali zmiešané triedy (iba jedna rómska), ktoré navštevujú aj deti so zdravotnými hendikepmi či deti pochádzajúce z rôznych sociálno-ekonomických a kultúrnych prostredí. V projekte EDUMIGROM, ktorý mal charakter komplexných prípadových štúdií vzdelávania rómskej menšiny v dvoch slovenských mestách, autorka kombinovala viaceré nástroje zisťovania: individuálne a skupinové rozhovory so žiakmi, učiteľmi a rodičmi (osobitné fókusové skupiny s každou kategóriou) a rozhovory s aktérmi samosprávy a štátnej správy.

Desegregácia a integrácia sa aj na Slovensku považuje za nutnú reformu vzdelávania. Pripomeňme, že podľa zisťovania PISA Slovensko patrí medzi krajiny s najrozšírenejšou praxou skorého rozdeľovania žiakov do vzdelávacích prúdov na základe prospechu. Neraz sa však spojenie žiakov s rôznorodými potrebami a zázemím v jednej triede zjednodušene chápe ako dostačujúce pre zlepšenie prospievania najslabších. Treťou kapitolou nás autorka pozýva nahliadnuť do každodennosti procesu vzdelávania v takýchto triedach. Už z názvu kapitoly, *Každodenná školská práca*, možno predpokladať, že jej obsahom sú popisy práce pedagógov. Autorka tu analyzuje inkluzívne vzdelávanie z vertikálneho pohľadu, teda skúma aké možnosti majú a akým prekážkam učitelia čelia v náročnom prostredí tried s heterogénnou skladbou žiakov pri plnení svojich každodenných úloh, ktoré musia zväčša zvládať bez asistujúceho

personálu a pri veľkom počte žiakov. Náročnú situáciu vyvolávajú dve skutočnosti. V prvom rade ide o rozdelenie pozornosti učiteľa voči potrebám rôznorodých žiakov a druhým je udržanie pozornosti žiakov počas priebehu vyučovacieho procesu.

V ďalšej časti tejto kapitoly autorka približuje pohľad učiteľov a rodičov na výhody a nevýhody rozšíreného praktikovaného rozdeľovania žiakov podľa dosiahnutých výsledkov v škole. Viacero učiteľov i rodičov podporuje myšlienku separácie detí do tried podľa školského prospechu a tiež tvrdia, že toto opatrenie napomáha k efektívnejšiemu fungovaniu vyučovacieho procesu. Problémy s udržaním pozornosti sa vyskytujú aj v triedach s deťmi s homogénnym sociálno-ekonomickým zázemím, no z pozorovaní vyplýva, že problémy v škole a horší prospech sa týka predovšetkým detí s nižším kultúrnym, ekonomickým či sociálnym kapitálom, a súčasne tieto deti dostávajú menšiu pozornosť zo strany pedagógov. V niektorých momentoch bolo možné spozorovať nezájem o týchto žiakov až ignorovanie zo strany učiteľov.

Viacero výskumov potvrdzuje, že nízke príjmy rodičov i nízka úroveň dosiahnutého vzdelania patria medzi najsilnejšie prediktory školskej úspešnosti detí. Štvrtá kapitola, *Neisté školské kariéry*, je písaná na základe rozhovorov s učiteľmi, ktoré boli realizované v rámci projektu EDUMIGROM, ktorý sa zameriaval na vzdelávanie rómskych žiakov. Kapitola sprostredkúva jednotlivé výpovede o bariérach, ktoré musia pedagógovia prekonávať počas svojej práce. Pedagógovia upozorňovali okrem iného na jazykovú bariéru, ktorá rómskych žiakov znevýhodňuje počas celého vzdelávania a sťažuje adaptovanie na vyučovacie tempo.

Deti v otvorenom školskom systéme s nerovným vkladom ekonomického, sociálneho či kultúrneho kapitálu sú v školskom prostredí častokrát stigmatizované: často sa stávajú terčom útokov, môžu byť ponížované či odstránené mimo kolektívu. V poslednej kapitole, *Inklúzia ako prijatie*, sa autorka zaoberá horizontálnym rozmerom inklúzie, pričom analyzuje interakcie a vzťahy medzi spolužiakmi, a intervenovanie učiteľov do týchto vzťahov. Pozorovania ukázali, že časť žiakov je v triede permanentne marginalizovaná, nie je pozývaná a zapájaná do spoločných aktivít a v niektorých prípadoch aj priamo vylučovaná, a to aj v prítomnosti učiteľov. V dôsledku tejto skutočnosti sa autorka snažila zistiť, ako pedagógovia vedú žiakov v spolupráci, či a v akej miere zasahujú do sporov medzi deťmi, aký spôsob komunikácie prebieha medzi nimi a či vystupujú ako zmierovatelia. Pokiaľ ide o povzbudzovanie k spolupráci a rozvíjanie spolupráce, autorka na základe pozorovaní konštatuje, že vyučujúci proces neposkytuje dostatočný priestor na vedenie detí k spolupráci. V niektorých školách deti spolupracovali len počas kolektívnych športov na hodinách telesnej výchovy. Samozrejme, že v rámci niektorých predmetov žiaci spolupracujú na jednotlivých úlohách, no ich správanie sa odlišuje od očakávaní vyučujúceho. Ukazuje sa, že sa žiaci s rôznymi znevýhodneniami či jazykovou bariérou nedokážu naplno zapojiť do spolupráce a nevedia splniť zadanie učiteľa. Etnografické pozorovania ukázali, že v prostredí školy sú takéto deti nielenže ignorované zo strany detí, ale aj zo strany učiteľov, čo je závažný problém, pretože škola je rozhodujúcim miestom pre praktickú univerzálnu morálnu výchovu, a miestom pre precvičovanie a osvojenie si ohľaduplného správania. Ako sme už zdôraznili, autorka na podmienky inkluzívneho vzdelávania nazerá s normatívnym očakávaním a predpokladom, že škola bude viesť žiakov k osvojovaniu a dennému praktizovaniu takéhoto správania, ktoré je základom pre humánnejšiu spoločnosť.

Publikácia Z. Kusej obsahuje veľké množstvo cenného empirického materiálu, avšak miestami má čitateľ dojem, že je ním až presýtená, v dôsledku čoho postráda hlbšiu analýzu skúmanej problematiky. Na druhej strane však treba povedať, že pesimistický názov, ktorý autorka udelila svojej monografii skutočne zosobňuje resp. vystihuje situáciu na pôde skúmaných slovenských

škôl. Autorka svojou prácou a výskumom prináša obohacujúci text, pomocou ktorého dáva do povedomia inštitucionálne medzery a tiež medzery v pedagogickom systéme, brániace inkluzívnemu vzdelávaniu na Slovensku.

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**Bahadir, Bozoglan. *Psychological, Social, and Cultural Aspects of Internet Addiction*.
Hershey, PA, 2018, 390 pp. ISBN 9781522534785**

Internet addiction is a recent phenomenon which can be characterized as a state where people become so involved in online activities that it is to the detriment of other facets of their lives. In today's world, the internet plays a major role in increasing people's vulnerability towards many forms of addiction and psychiatric disorders as well as providing opportunities to manage them effectively. *Psychological, Social, and Cultural Aspects of Internet Addiction* is a comprehensive resource that explains the relationship between psycho-social variables and addiction to online activities. It covers variables such as family and social factors, academic performance, personality, loneliness, a range of possible mental disorders and their available treatment. It has been divided into five sections which have been separated into chapters. Each section assesses a different perspective on the impact of Internet addiction on individuals and society as a whole.

The first section describes Internet addiction as a global phenomenon. The first chapter shows how the Internet enables dangerous behaviors such as buying illicit drugs and nonprescription medications, online gambling, online sex-related activities and unregulated online shopping. These behaviors can easily take the form of addictions. This is followed in the next chapter by covering the symptoms of such addictions and the methods for treating them. The final chapter in this section discusses the necessary role of the Internet in both business and education and many other fields of our lives. It provides a synopsis of how the Internet can affect our lives for the better, but can also cause unexpected difficulties.

The second section focuses on the psychological aspects of Internet addiction. This section opens with a chapter that covers a number of technological addictions and illustrates how theory and research in this field is connected to commonly researched personality traits such as extraversion, neuroticism and narcissism. It also explains key individual personality differences in people inclined to overuse the Internet. The following chapter concentrates on excessive Internet use and its impact on the well-being of a students of computing, who are forced to be online more often in comparison with the average population. Through empirical research, well-being and sources of life satisfaction and dissatisfaction among heavy users and light users are compared. In the final chapter of this section the authors seek to determine the link between loneliness and adverse Internet usage. The findings indicate that time spent online and loneliness are relevant determinants of Internet addiction.

Social aspects of Internet addiction are discussed in the third section. The initial chapter of this section serves as an overview of the existing knowledge on socioeconomic factors in the shaping of adverse online behaviors. The authors review and evaluate fifteen original research articles on this topic. The next chapter seeks to provide an analysis of the risk and protection factors in children and adolescent Internet addiction in relation to the family context and parenting behaviors. The last chapter looks at the causes and consequences of persuasive messaging in cyberspace which can influence our behavior in an underhand yet effective way. It explains how these messages make use of social networks to manipulate people's attitudes in order to achieve political, economic or social profit.

The cultural aspect of Internet addiction is the topic of the fourth section. In this section the status of Internet addiction in different countries including China, Turkey, Taiwan, South Korea, Italy, Greece, Japan, Norway, Poland and many others is investigated. The authors in this section also investigate the risk of Internet addiction among Slovenian adolescents and the interplay between the overuse of the Internet, socio-demographic factors, free-time activities, self-control, and perceived satisfaction with life.

The final section in this book aims to bring together all of the points through discussing strategies for treating Internet addiction and future research directions. The author emphasizes the need for identifying the definitions of Internet addiction, the symptoms and their treatment, and the appropriate approaches in dealing with this addiction. This part is instructive for parents, Internet addicts, educators and healthcare providers to better understand all the underlying mechanisms behind Internet addiction.

This publication is a valuable source of information on a topic that is often underestimated and under-discussed. It reveals an alarming occurrence of problematic online behavior and reminds us to be wary of its influence on us, on our close ones and on the whole of society. It is a topic that has gained more attention in recent years and in the near future will be as important as substance abuse.

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Správy

Reports

*Človek a spoločnosť
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NOVA

Správa z medziodborovej konferencie „Na prahu nové doby“, Praha, Česká republika, 26. – 29. október 2018

Interdisciplinary Conference Report “On the Threshold of a New Era“, Prague, Czech Republic, 26th – 29th October 2018

V roku 2018 si pripomínáme okrúhle výročia udalostí, ktoré sa odohrali v rokoch 1918, 1938, 1948, 1968 a 1988. Tie patria k významným míľnikom našej histórie. Z toho dôvodu je rok 2018 vyplnený obrovským množstvom vedeckých i popularizačných podujatí a akcií, ktorých cieľom je pripomenúť si tzv. osmičkové výročia. Jedným z podujatí, ktoré sa uskutočnilo pri príležitosti stého výročia vzniku prvej Československej republiky, bola medziodborová konferencia o počiatkoch Československej republiky s názvom „*Na prahu nové doby*“. Konala sa v Prahe v dňoch 26. až 29. októbra 2018. Konferenciu organizoval Ústav štátu a práva Akadémie vied Českej republiky v spolupráci s Ústavom štátu a práva Slovenskej akadémie vied, Ústavom právnych dejín Právnickej fakulty Univerzity Karlovy, Filozofickou fakultou Univerzity Karlovy, Filosofickým ústavom Akadémie vied Českej republiky a Ústavom dejín umění Akadémie vied Českej republiky. Miestom konania konferencie bola hlavná budova Akadémie vied Českej republiky (ďalej AV ČR) a budova Ústavu štátu a práva AV ČR.

Dňa 26. októbra otvoril konferenciu RNDr. Antonín Fejfar, CSc., predseda Vedeckej rady AV ČR, ktorý privítal účastníkov na pôde AV ČR. Po jeho úvodnom slove nasledoval príhovor PhDr. Petra Weissa, CSc., veľvyslanca Slovenskej republiky v Českej republike. Počas slávnostného otvorenia konferencie sa účastníkom prihovoril aj prof. JUDr. Jaroslav Fenyk, Ph.D., DSc., Univ. Priv. Prof., podpredseda Ústavného súdu Českej republiky, ktorý prevzal záštitu nad konferenciou. V rámci dopoludňajšieho spoločného zasadnutia odznelo okrem spomenutých úvodných prejavov aj päť prednášok, ktoré sa na medzivojnovú Československú republiku pozreli z viacerých aspektov. Ako prvý vystúpil prof. JUDr. Karel Malý, Dr.Sc., Dr. h. c. s témou „*Zakotvení demokratických tradic v novém ústavním pořádku a překonání monarchické tradice rakouské*“. Prednášajúci hovoril o zmenách v právnej oblasti, ktoré so sebou prinieslo najmä prijatie ústavy vo februári 1920, čím došlo okrem iného k úprave občianskych práv a slobôd, vrátane zrovnoprávnenia žien či zrušenia inštitúcie šľachtictva. Za ním nasledoval výklad prof. PhDr. Miroslava Hrocha, DrSc., Dr. h. c. s názvom „*Národní stát jako hodnota specificky evropská?*“. „*Mezinárodní souvislosti vzniku samostatného československého státu*“ predstavil po krátkej prestávke prof. JUDr. Jan Kuklík, DrSc. Po ňom pokračovala doc. Mgr. Libuše Heczková, Ph.D., ktorá hovorila na tému „*Moderní – civilizovaná – emancipovaná – přirozená žena? Myšlení o ženě jako součást sociálních a politických debat o československé společnosti*“. Prednášajúca sa zaoberala dobovými debatami o povahe modernej ženy, a to z pohľadu sociológie, politiky a médií. Spoločné zasadnutie ukončil doc. PhDr. Stanislav Holubec, Ph.D. et Ph.D. s prednáškou „*K historiografii první republiky v posledních desetiletích*“. V popoludňajších hodinách prvého dňa konferencie boli prezentované samotné konferenčné príspevky, rovnako, ako to bolo aj počas nasledujúcich troch dní.

Počas prvého dňa boli referáty prezentované v rámci 8 konferenčných blokov. Z tematického hľadiska išlo o príspevky týkajúce sa ženskej problematiky, národnostnej otázky, vedy a školstva, právnej vedy, štrajkov, zdravotníctva a sociálnej hygieny. K zaujímavým patrili napr. referáty „*Rovnost při studiu, rovnost v profesi?*“, „*Open Door International a diskuse o legislativních omezeních ženské práce v Československu*“ alebo „*Vztah katolických ženských spolků k emancipačním trendům*“. Druhý deň boli prezentácie rozdelené do 13 blokov, ktoré sa venovali medzinárodnému zaisteniu ČSR, umeniu, filmu, úradníctvu, hospodárstvu, Rómom a židom, komunikačným sieťam a národnostnej otázke. Účastníci konferencie si mohli okrem iného vypočuť príspevok „*Demokratická pohodlnost: Prvorepublikové ideály „normalizace“ domácnosti, ženské práce a těla*“ alebo „*Užhorodské kinosály jako prostředek pro sledování filmů na Podkarpatské Rusi*“. V priebehu tretieho dňa konferencie pokračovali prednášajúci s príspevkami zaoberajúcimi sa prístupmi k východnej časti ČSR a ich reflexiou, archívnictvom a pamiatkarstvom, miestami pamäti, migráciou, sexuálnou reformou a právnou teóriou 20. rokov, ktoré vytvorili spolu 6 konferenčných blokov. Medzi najzaujímavejšie referáty patrili „*Československo-rakouská archivní rozluka po 100 letech – právní, odborné a etické aspekty*“, „*Homoerotika a reformní pedagogika: Wootawannova cesta k čistému lidství*“, „*Andělíčkářky a jejich nezákonná praxe versus legislativa. Pokus o legalizaci potratů*“ a „*Ochranné prostředky ano či ne? Tři pohledy na antikoncepci na prahu nové doby*“. V posledný deň konferencie odzneli referáty v rámci 13 blokov. Týkali sa otázky hospodárstva, štátnych ozbrojených zborov, školstva, voľného času, sociálnej politiky, unifikácie práva a archívnictva a pamiatkarstva. Prednášajúci vystúpili napr. s príspevkami „*Policejní ředitelství v Praze na prahu republikánské éry*“, „*Počátky reformně pedagogické diskuse v samostatném Československu 1918 – 1926*“ alebo „*Legislativa a školská reforma v počátcích vzniku ČSR (1918 – 1925)*“.

Konferencie sa zúčastnilo spolu viac ako 190 prednášajúcich a garantov jednotlivých sekcií z Českej republiky, Slovenska, Francúzska, Maďarska, Poľska, Rakúska, Slovinska a Srbska. Počas štyroch dní odznelo viac ako 160 príspevkov (v českom, slovenskom a anglickom jazyku), ktoré vytvorili dokopy až 40 konferenčných blokov. Príspevky boli počas prvého a druhého dňa prezentované súčasne v 4 miestnostiach a počas tretieho a štvrtého dňa odzneli paralelne v 3 miestnostiach. Na konferencii bolo teda prezentovaných veľa zaujímavých, inšpiratívnych a kvalitných referátov, ktoré obsahovali najmä výsledky novších výskumov k širokému spektru tém týkajúcich sa medzivojnovej Československej republiky.

Jednotlivé konferenčné príspevky boli súčasťou 31 sekcií (niektoré boli kvôli väčšiemu počtu prednášajúcich rozdelené do dvoch, resp. troch konferenčných blokov), ktoré patrili do 9 tematických okruhov. Tematický okruh A: *Diference, zájmy, stratifikace* zahŕňal päť sekcií: Sociálna politika ve stredoevropských spoločnostech poválečných let; Bydlení a architektura ve stredoevropském poválečném myšlení; Práce – spory – stávky; Životní úroveň a trávení volného času; Náboženství versus sekularita. Súčasťou tematického okruhu B: *Kulturní stát?* bolo tiež päť sekcií: Novou školou k novému světu? Boje o školskou reformu a školské pokusy; Vědní a vysokoškolská politika; Umění, stát a reprezentace; Film jako popkulturní fenomén a průmyslové odvětví; Uchovávací republika: změny a vize v archivnictví a památkářství. Do tematického okruhu C: *Hranice – centrum – periferie* patrili tri sekcie: Bratr, investor, kolonista? Východ ČSR – přístupy a reflexe; Proměna hranic hospodářského prostoru a komunikačních sítí: pohyb a energie na jiných cestách; Migrace – příslušnosti – azyl. Tematický kruh D: *Právní, hospodářské a správní struktury* obsahoval šesť sekcií:

Republika právníků? Právnícké profesní světy; Místní moc v počátcích republiky mezi setrvalostí a změnou; Sjednocování práva; Hospodářská samostatnost a hospodářský nacionalismus; Státní struktury: správa, samospráva a jejich úřednictvo; Hospodářská moc, její struktura, zájmy a dynamika. V rámci tematického okruhu E: *Spory o nadvládu a emancipaci* bolo vytvorených päť sekcií: „Politicky, sociálne a kultúrne rovné?“ Nesnadná emancipácia žien v poválečnej spoločnosti; Národnostná otázka – dobový diskurs, reflexe, konflikty; Sexuálna reforma: oslobodené city, oslobodená tela; Zdravie, sociálna hygiena a postihnutí; Romové a židé: represe, emancipácia a možnosti srovnání? V tematickom okruhu F: *Právněteoretické, filosofické a politické rámce* boli dve sekcie: Nová ústavněprávní řešení ve středoevropských ústavách a praxi 20. let; Povaha práva očima středoevropské právní teorie a právní filosofie dvacátých let. Súčasťou tematického okruhu G: *Československo: mezinárodní projekt* boli taktiež dve sekcie: Mezinárodní zajištění vzniku státu a počátky jeho diplomacie; Nové cesty ve střední Evropě. Do tematického okruhu H: *Trestání, násilí a ozbrojenost* patrila jedna sekcia: Proměny státních ozbrojených sborů. Tematický okruh J: *Minulost a budoucnost: politika paměti, filosofie dějin a představy nového* zahŕňal dve sekcie: Československo jako uskutečnění filosofie českých dějin?; Nově utvářená a odstraňovaná místa paměti – fyzické a symbolické prostory.

Vo výzve na prihlasovanie príspevkov organizátori uviedli, že: „Prvořadým cílem konference je dialog mezi právní, sociální, politickou a hospodářskou historiografií, dějinami umění, filosofií, antropologií, sociologií a dalšími obory.“ Vzhľadom k veľkému počtu prezentovaných príspevkov, ich kvalite a taktiež podnetným diskusiám, ktoré sa rozvinuli v jednotlivých konferenčných blokoch, môžeme konštatovať, že cieľ konferencie bol splnený. Z hľadiska organizácie splnila táto konferencia štandardné kritériá. Nedostatkom však môžu byť 3 – 4 paralelne prebiehajúce bloky, čo značne obmedzuje účastníkov pri výbere príspevkov, ktoré by si radi vypočuli. Vybrané konferenčné príspevky budú publikované v recenzovanom zborníku.

Ďalšie informácie o konferencii a jej programe nájdete na:

<https://www.ilaw.cas.cz/vyzkum/vyzkumne-projekty/konference/conf.html>

alebo na:

<https://www.dropbox.com/sh/7xva6yyoun6xduh/AAAXdS5ytnvoN4q5v1ZnpixA?dl=0>

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Conference report from the sixth International Conference of the Czech Oral History Association: *From Democracy to Democracy: Oral History in Research of Contemporary History*, Olomouc 6th – 7th February 2019.

Every two years, the Czech Association of Oral History (COHA) organizes an international conference. Following the previous one in Brno in 2017, in February 2019, oral historians, ethnologists, historians, anthropologists and other social scientists went to the university town and historical metropolis of Moravia, Olomouc, at the Palacký University, where they presented their research (including doctoral theses and scientific projects) and exchanged ideas.

Over two days, 32 speakers participated in the conference. The speakers came from the Czech Republic, Slovakia and Italy. The Institute of Contemporary History (ÚSD), which is also the co-organizer of the conference, had the highest representation. During the Wednesday morning session, the participants (Miroslav Vaněk, Petra Schindler-Wisten, Jana Wohlmuth Markupová, Veronika Pehe, Pavel Mücke and Lenka Krátká – all from ÚSD) presented the project *The Student generation of 1989 from a time-lapse perspective. Biographical interviews after twenty years*. The new project builds on the project *A hundred student Revolutions*, which represented student leaders' experiences from the period of the Velvet Revolution. In 2017, the continuation of this project was approved and should be finalized this year.

Lenka Krátká gave an interesting presentation which focused on the position and participation of women during the Velvet Revolution; in contrast to the more common male perspective of the revolution (from such participants as Václav Havel, Šimon Pánek, Mark Benda and Martin Mejstřík).

Then the international conference was held in parallel blocks that were thematically arranged into the following blocks: *Historical milestones from the perspective of oral history* (speakers: Štěpánka Skálová, Marie Barešová, Hana Hlášková, Ottone Ovidi); *Oral history and military history* (speakers: Petr Wohlmuth, Jiří Hlaváček, Pavel Stehlík, Radek Švec); *Theory and methodology of oral history* (Speakers: Monika Vrzgulová, Radmila Svaříčková Slabáková, Nina Pavelčíková, Pavel Nečas); *Ethnic and regional identity in oral history* (speakers: Marie Fritzová, Irena Cejpková, Jana Poláková, Klara Kohoutová); *Oral history and the history of socialism* (speakers: Oto Polouček, Michal Louč, Radmila Kaděrová, Jiří Zounek, Michal Šimana, Eva Meiringerová); *Oral history and culture* (speakers: Lucie Marková, Lucie Čepcová, Klára Hedvika Mühlová, Hana Bortlová Vondráková).

The Institute of Social Sciences, the Centre of Social and Psychological Sciences, and the Slovak Academy of Sciences were represented at the conference by Klara Kohoutová. Her contribution was about Roma sites of memory in public space in the Czech Republic and Slovakia. This is a comparative analysis between the two parts of the former Czechoslovakia. The contribution pointed to the common and distinct features of looking at the Roma past and the way in which it entered the official commemorative culture in each country.

Great attention was given to a contribution by Monika Vrzgulová from the Institute of Ethnology and Anthropology of the Slovak Academy of Sciences. She talked about the co-creation of the source and about the relationship between the interviewer and the narrator. It

was a methodological contribution whose added value was its field experience. Jana Poláková from the Moravian Museum presented research on Greek minorities in the Czech Republic. It was a project aimed at the general public. The project focused on the issue of self-identification of minority members across generations. Many participants were also interested in the contributions of Jiří Hlaváček and Pavel Stehlík, who have been involved in military history for a long time. Jiří Hlaváček focused on the phenomenon of basic military service after the Prague Spring, while Pavel Stehlík presented oral-historical research of Czech soldiers from military operations in Mali. Hana Bortlová Vondráková closed the conference with a contribution about travel. The aim of the paper was to provide information on the possibilities and limits of business trips abroad between 1945 – 1989.

The conference offered a platform for information exchange and establishing new contacts, both on an individual and working basis. Not only historians, but also ethnologists, anthropologists and other scientists from the humanities and social sciences met. Selected papers from the conference will be published in the almanac.

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