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Estonia – Highly Unequal but Classless?

Jelena Helemäe* & Ellu Saar

Abstract

In this short essay, we try to assess the utility of class analyses for understanding the contemporary Estonian society. Erik Wright (2009) identifies three strands of class analysis: a stratification approach, a Weberian approach and a Marxist approach. We address the following questions: Which kind of class analysis is most present in Estonia today? Which is most needed? The main conclusion is that due to this marginalisation of class discourse, as well as the power of national/ethnic discourse and transitional culture, those most economically vulnerable were deprived of the cultural and discursive resources to resist the most the extreme market-oriented policies. The conditions for structuration of class relations were created, while the class and inequality discourse was marginalised.

Keywords: class, class analysis, public class discourse, post-communist transformation, Estonia.

A lot of inequality and lack of public discourse

Shortly before the Wall Street crash of 2008, social scientist Anu Toots (2007) noted that not much attention is paid to social inequality in Estonia – neither by the public, nor the media. Indeed, it seems we do not know how to speak about this topic. Anu Toots is right: talking about inequality is regarded as embarrassing or discreditable, similar to the way talking about venereal disease was seen decades ago. The assumption in society is that things just happen, not that they are caused. The assumption is that an ‘invisible hand’ operates in both the economic and the social spheres.

By the late 2000s, Estonia had one of the most liberal market economies and most unequal distribution of income of any country in the European Union (Kazjulja & Paškov 2011). With its already severe social inequalities and its high financial exposure, Estonia was particularly vulnerable to the economic crisis. Other Baltic countries were in a similar position. As Ray (2009: 333) has suggested, the particular combination of post-socialist class formation and integration into global institutions generates numerous local effects and conflicts. Latvia had to turn to the International Monetary Fund in order to keep its economy afloat. In January 2009, thousands demonstrated against their worsening social and economic conditions. After a long period of ‘quiet on the class front’, the current economic crisis has refocused attention to social inequality and class analysis, particularly to the way in which neoliberalism has turned out to be a successful attempt at the restoration of upper class power (Harvey 2006).

Or has it? Because public discourse on class issues is still marginalised in Estonia, just as it has been in most other post-communist countries (Ost 2009). Similarly to Latvia, identity politics has remained the major issue during these transformative years in Estonia. Bohle (2010) approaches identity politics as the elite’s way to face the challenges of the ‘triple transition’ (Offe 1991) to introduce democracy, capitalism, and to rebuild the nation, all at the same time. Adam et al. (2009) explain it as due to

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the ‘external’ threat in the form of Russia. Estonian politics is dominated by conservative-liberals, combined with a populist/nationalist appeal (Lagerspetz & Vogt 2004). According to Vanhuysse (2009), Estonian power-holders have designed public policies and shaped social solidarity in ways that made existing levels of ethno-linguistic heterogeneity politically more salient, at the expense of class and other existing social cleavages (cf also Vetik & Helemäe 2011). In other words, at-risk workers have been divided along ethnic lines to hamper the coalition of socio-economically similar social groups (classes).

This is hardly an original strategy. Ost (2009) also indicates that class distinctions in Poland were made not along economic lines but along cultural ones. In Latvia, socio-economic grievances are also often organised along national lines (Bohle 2010). What makes the Estonian case distinctive is the long-lasting success in focusing attention on nationalising issues, while effectively marginalising any class and inequality discourse. What Michael Kennedy (2002) has called ‘transition culture’ has also contributed to the marginalisation of class discourse. Transition culture posits the exhaustion of socialism and the normative superiority of capitalism. Since class was the central category in the old state socialist regime, groups with weaker social and economic positions that might want to focus attention on class outcomes are marginalised from the start, because their claims for social justice appear socialist and, thus, backward, in the context of this transition culture (Lauristin & Vihalemm 2009). Due to this marginalisation of class discourse and the power of the national/ethnic discourse and transitional culture, those most economically vulnerable were deprived of the cultural and discursive resources to resist the most extreme market-oriented policies. The conditions for structuration of class relations were created, while class and inequality discourse was marginalised.

What was the result of this? We suggest that this systematic shunning of class discourse influenced the dominant interpretations of social reality, affected the strategies of social actors, led to a misperception of class interest at the lower steps of the social hierarchy, and in this way shaped the context of post-communist Estonian class formation. As Bottero (2004: 999) noted, the rise (and fall) of class cultures and identities “is related to the nature of ‘class’ in public life, particularly to politicised claims and discourses or ideologies of hierarchy and inequality”.

Diversity of class analyses

Crompton (1998) has emphasised the range of different meanings of the class concept, including ‘class’ as prestige, status and lifestyle; ‘class’ as structured economic and social inequality; ‘classes’ as actual or potential social and political actors. A diversity of class analyses reflects the complexity of the class concept itself. Crompton (1998) differentiated four approaches: studying the processes of the emergence and perpetuation of advantaged and disadvantaged groups or classes within society; studying the consequences of class location; studying the significance of class; studying the development of class cultures and identities. According to Wright (1997a), the first approach studies class as a dependent variable, which means a particular class is that which has to be understood and explained. The second approach studies class as an independent variable, where class position is used to explain attitudes and behaviours or where class agency or class conflict are seen as causal to broad social outcomes.

Wright (2009) separated three types of class analysis: the stratification approach (or the individual attributes approach), the Weberian approach (the opportunity-hoarding approach) and the Marxist tradition. The first one identifies classes according to the attributes and material conditions of individuals. Here the focus is on the process through which individuals are sorted into different positions in the class structure. This approach devotes a great deal of attention to intergenerational social mobility. However, as Wright (2009: 104) indicates this approach does not take into consideration

the inequalities in the positions people occupy or the relational nature of those positions. The Weberian approach focuses on ‘opportunity hoarding’, identifying this as the central mechanism of access to and exclusion from certain economic opportunities. The main topic is not who are excluded, but the mechanisms of exclusion (for example, educational credentials, accreditation, licensing, etc.). The Marxist tradition focuses on mechanisms of exploitation and domination, in which economic positions accord some people power over the lives and activities of others. This typology emphasises the analysis of class structure.

Wright (1997b) himself mentions that class structure is only one element in class analysis. Other elements include class formation (the formation of classes into collectively organised actors), class struggle (the practices of actors for the realisation of class interests) and class consciousness (the understanding of actors of their class interests). Several authors also argue that what is required is a closer investigation of interests and identities (Crompton & Scott 2000, Devine & Savage 2000, Bottero 2004, Bottero 2009).

Class analysis in Estonia

According to Erik Olin Wright’s (2009) typology, class analysis in Estonia falls mostly under the ‘stratificational’ approach. The central focus of research is on the individual’s economic prospects and their prerequisites: who goes where and who gets what. In this way, the processes through which (a) people who are endowed with educational and social resources attain certain positions (types of occupations), and (b) people obtain these resources themselves are studied. Here the main focus is on the process and factors of inter- and intra-generational mobility, differentiation of life courses and gender, age and ethnic inequalities.

Exploration of intergenerational mobility is conceptualised here according to the Nuffield approach (e.g. Goldthorpe 1996) or according to Bottero’s (2004: 985) “precise and contained approach to the meaning of class”. Studying intergenerational mobility in Estonia has a long tradition (see for example Titma et al. 1982, Kenkmann et al. 1986, Kirkh & Saar 1986, Titma & Saar 1996). Previous findings on intergenerational mobility in Estonia mainly concerned two education cohorts (Titma & Roosma 1999, Helemäe et al. 2000, Roosma & Täht 2001, Titma et al. 2003). One cohort (born in 1948) graduated secondary schools in 1966 and the other (born in 1965) in 1983. The former cohort, who is among the first post-war cohorts, was at the same time also among the first Soviet-born cohorts, as Estonia was annexed by USSR in 1940. The lives of their parents were affected by the relationship between the family and the regime (cf Johnson & Titma 1996, Helemäe et al. 2000). Recently gathered Estonian Social Survey data made the analysis of intergenerational social mobility for the birth cohorts from 1930 to 1974 possible. Whatever the sources of data are, it seems that it is too early to make any conclusions about class reproduction during the post-communist period. The birth cohorts that entered the labour market after the collapse of the former Soviet Union only recently started to approach their 30s. But we learned from previous analysis that even during the rather short Soviet period (in terms of historical time), some sub-periods with quite different structural conditions and, accordingly, with quite different mobility patterns might be specified (Saar 2010, Helemäe & Saar 2011). In other words, overgeneralisations must be avoided not only in relation to global processes (e.g., Ray 2009) or post-communism (e.g., Stenning & Horschelmann 2008), but even in the case of communism.

In studies of intragenerational (life course) mobility, approach to ‘class’ was also minimalistic. With regard to post-communist transformation, our analysis indicates clear cumulative advantage and disadvantage patterns in life courses. The winner and loser divide from the first half of the 1990s was consolidated during the second half of the decade (see Titma et al. 1998, Saar 2011). It was very

hard to overcome exclusion from the first phase. The channels by which risks were shifted depended upon pre-existing inequalities of resources. Increasing economic risks in the process of post-socialist transformation were shifted towards the more disadvantaged groups within the labour force; the market transition benefited those who were already better rewarded. The Estonian labour market is clearly segmented in terms of employment security and chances of mobility.

As Wright (2009) points out, in this way advantages or disadvantages in achieving the favourable class positions are approached largely as the outcomes of individual conditions. In some sense, this conceptualisation of social processes follows the logic of dominant political neoliberal rhetoric. Of course, even Estonia's neoliberal elite would not question the fact that today's social hierarchy has been largely influenced by the fundamental change in power relations and laws that redistributed control over economic resources. One might get the impression that our stratification approach, by default, shares assumptions of 'transition culture' (see Kennedy 2002), i.e. that the main priority of societal transformation was the formation of markets, and that once capitalist power relations and laws were adopted and market institutions introduced, freedom and equality of opportunity in access to good jobs would become guaranteed for everyone and forever.

But things are not so bad – the Estonian version of the stratification approach is not so individualistic. Important work has also been devoted to understanding the structural conditions of individual behaviour. Results of the analyses of intra- and inter-generational mobility are generally interpreted as a consequence of the peculiarities of Estonia's institutional context (see Saar 2010, Helemäe 2011). In terms of Wright's typology (2009), such institutional contextualisation is something 'in-between' the stratificational and opportunity-hoarding approaches. The latter is about access to and exclusion from certain economic opportunities or about being closely associated with Max Weber's concept of social closure.

Although not articulated through class closure terms, studies of educational transitions (Saar 1997, Aimre & Saar 2013) as well as transitions from education to the labour market (Kogan & Unt 2005, Saar et al. 2008, Täht et al. 2008, Unt 2011, Lindemann & Saar 2013, Unt & Lindemann 2013) approached mechanisms through which people are excluded from acquiring education or from the labour market. Also, analysis of the labour market opportunities of different ethnic groups indicated that exclusionary identity politics had an impact on the disadvantaged position of non-Estonians in the Estonian labour market (Saar et al. 2009, Lindemann 2011).

As to the exploitation and domination approaches, basic for Wright's class analysis typology and closely associated with the Marxist tradition, these are virtually absent in Estonia.

A culturalist approach to class analysis, however, connected with a stratificational one, is quite widespread in Estonia (see Kalmus et al. 2004, Lõhmus et al. 2009). It has refashioned class analysis by placing much greater emphasis on the processes of culture, lifestyle and taste. In Estonia, researchers are working within a Bourdieuan framework, looking for an impact of social position on these cultural processes (see Paadam 2003). The emphasis is on the classed nature of particular social and cultural practices, while the term 'class' itself is more often avoided.

Such a discursive Westernisation (Stenning 2005: 984) might be at least partly explained by the wider context. By the mid-1990s, when the first large-scale quantitative data became available to trace shifts in employment structures, discussions on the 'end of classes' (Pakulski & Waters 1996) and 'end of work' (Rifkin 1995) were just emerging in the West. The 'double ending' (Stenning 2005: 993) or the 'end of work', along with the 'end of socialism', contributed to the conceptual confusion in Estonian stratification research. It was not clear not only to what extent post-communist countries are becoming 'real' capitalist ones, but also what this (new?) 'real' capitalism looks like (see Nölke & Vliegthart 2009).

What is needed?

The challenge is to re-study and re-interpret recent Estonian analyses on social mobility as processes of class formation.

This could first be done in relation to privatisation. The centralised privatisation programme started with the establishment of the Estonian Privatisation Agency in 1992. After the change in privatisation policies, it became very rare for enterprises to be privatised to employees (Kalmi 2003). Most of the large enterprise privatisation followed the ‘Treuhand’ approach of individual sales through evaluated bidding. This means that groups with access to capital, including foreigners, were in a strong position. There were no restrictions placed on foreign ownership of former state enterprises or on new foreign investments. It is estimated that foreign investors obtained around 40% of the privatised assets in Estonia (Saar & Unt 2006). Thus, Estonia has seen not only the slowness of the emergence of a domestic ‘grand bourgeoisie’ (Szelenyi 2008), but also the quite modest size of a bourgeoisie at all. Due to the thinness of this group of owners, market capacities as bases for structuration of class relations seem to fit better than pure property ownership in the Estonian context.

The preliminary picture we suggest is that the wide support for national emancipation and a radical break with the past secured high trust in local leaders and their economic policy. The first stage of class formation was, thus, about the negotiation of the meaning of what Giddens (1973) called ‘market capacities’, meaning here both the conditions for their legitimation (e.g., the reaffirmation of some ‘Soviet-period’ rights) and the creation of opportunities for the acquisition of new market capacities (e.g., restitution of property, rules of privatisation). In Estonia, there were no forces able or willing to resist the recommendations of the international financial institutions to opt for a radically market-centred form of capitalism (‘liberal market economy’). The political decisions had radical economic consequences: the Estonian political elite delegated economic power to the ‘invisible hand of the market’, resulting in a very thin welfare state. The initial ‘definition’ of market capacities and the rules of their acquisition were of crucial importance, since they set the conditions of competition for the initial economic advantage. In this radical form of capitalism, initial advantage mattered and economic advantage was rapidly converted into dominance.

Here the preconditions for the structuration of class relationships are, therefore, very strong: Estonia has a liberal type of market economy, a widely accepted transition agenda, which leads to the sharp differentiation of life chances (including labour market chances), based on market capacities, and the importance of status groups (especially ‘Estonian’ vs. ‘Russian-speaking’ ethnicity), so that status group membership itself becomes a form of market capacity.

At the same time, the Estonian case also shows the power of nationalising discourse and transitional culture to contribute to a marginalisation of class discourse and the consequences of such marginalisation for class formation. In more general terms, we see here the difficulties in the construction of (class) identities and the articulation of certain (class) issues, given a lack of public discourse on these identities and issues. Previous research findings support these suggestions. Research on identity formation and social issues carried out in 1996 in Estonia, Ukraine, and Uzbekistan showed that the dominant transition culture exerts significant impact on the way the public approaches social change (Kennedy 2002, Saar 2002). While people in Estonia do appreciate freedom and opportunity and admit to the importance of responsibility, their perceptions of freedom are constrained by gender, ethnicity and class (Kennedy 2002). The issue of constraints to freedom did emerge during discussions, but given the silence of transition culture, with respect to conditions that limit freedom, respondents had serious difficulties with the articulation of such conditions (Kennedy 2002: 188). Saar (2002) showed that when telling success or failure stories, people tended to make individualistic attributions, but they were quite ambivalent in providing structural explanations. They mentioned

structural constraints but tended to legitimise them through recourse to a rhetoric of ‘necessity’ or ‘normalisation’ – that is, by treating the phenomenon as normal or typical for the Western world (Saar 2002: 298).

We suggest that the marginalisation of class discourse influences first of all workers whose class-consciousness and identity remain ‘underdeveloped’ in favour of ethnic identity. The middle class and especially the upper class have strong enough class-consciousness, which is enforced by membership in the (not only ethnic) status groups. In this way, the marginalisation of class discourse, in turn, contributes to a situation where class belonging has important implications for life chances, while those with lesser life chances (the working class) also have lesser capacity to affect the balance of class power. As Crowley (2008: 22) put it, “The power of labour still matters, even when it is absent”. The Estonian case seems to show the importance of public class discourse for class structuration, and the challenge for social science is to address this issue explicitly.

Given that the Marxist relational class analysis is well-suited for the studies of broad systematic transformations, it might be of great interest to rely on this approach not only for studying the transformation of recent socialism into capitalism, but also to understand the longer chain of transformations – from capitalism to socialism and back (see also Stenning & Hörschelmann 2008). In both Central Europe and the former Soviet Union, including Estonia, socialism lasted about fifty years or two generations. There was one previous analysis of intergenerational mobility of a cohort of those born in 1948 (i.e. one of the first Soviet-born cohorts) through three generations, including their parents and grandparents, many of whom were targets of repressions carried out as a result of the Soviet annexation of Estonia in 1940 (Helemäe 2000: 209). Results of this analysis indicate that in spite of the downward mobility of the parents’ generation during the Soviet period in Estonia, the generation of their children were advantaged to reach the position of the upper service class of their grandparents. This suggests that the main impact of change seems to hit (or empower) first of all the generation active during the societal change. Social inertia might reveal itself only later, with the social position of the next generation changing ‘back’ to that of the previous social position.

By studying market societies in the process of longer development, a rare opportunity exists to obtain fundamental insights about how institutions and markets interact to shape class formation and determine overall patterns of social inequality, which is the role of local and global actors in these processes. The unique experience of post-communist societies – their participation in both communist and post-communist transition experiments (cf. Outwhaite 2007) – makes them extremely valuable subjects for investigation. These societies can be seen as an extraordinary laboratory for testing both existing theories and elaborating new ones (Eyal et al. 2003). Alas, so far, however, post-communist countries have usually been incorporated only as additional case studies aimed at interpreting or affirming existing Western knowledge, when the real task – and opportunity – is to challenge and develop our knowledge (see Stenning & Hörschelmann 2008).

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