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TRUST AND SOCIAL ACTIVITY VERSUS INCOME RANGE. THE SPIRIT LEVEL CONCEPT IN THE LIGHT OF EUROPEAN SOCIAL SURVEY

1. Introduction

For years sociologists and social politicians have been considering the relation between an objective level of poverty and social problems present in a population¹. There has been an attempt to find the relation between the level of poverty, defined and measured in various ways, and the scale of social problems such as teenage pregnancies, single parenthood, crime (especially against people, and effecting from disturbed socialization), infant mortality, pathological obesity, poor results at school or unemployment among young men. Frequently, all efforts are wasted for one reason – the repetition, continuous explanation and analysis of a mistake which is looking for a determinant where it cannot be found. The simplest and most immediate explanation of all social problems is the very fact of poverty among people – the lack of multidimensional resources which leads to helplessness, idleness, alcoholism and illegal actions. Hence the most common forms of leveling the consequences of social problems through actions aiming at “pulling” people out of poverty above the level of income poverty, which according to many

¹ Ch. Murray, *Losing Ground. American Social Policy, 1950–1980*, New York 1984; idem, *The Emerging British Underclass*, London 1990; A.B. Atkinson, *Poverty in Europe*, Oxford 1998; idem, *Social Exclusion, Poverty and Unemployment* [in:] *Exclusion, Employment and Opportunity*, A.B. Atkinson, J. Hills (eds.), London 1998; A. Sen, *Development as Freedom*, New York 1999; Ch. Jencks et al., *Inequality: A Reassessment of the Effect of Family and Schooling in America*, New York 1972; J. Sachs, *The End of Poverty. How We Can Make It Happen in Our Lifetime*, London 2005.

researchers bring ambiguous or even opposite results², and in the opinion of others, in practice are often directed at improper recipients³.

At the same time, this might be a wrong direction. The measures used to fight social problems in both the micro – and macro-scale prove to be inefficient as their reasons have not been understood. Perhaps it is not the objective level of poverty that people live in to determine the scale and increase of all kinds of social problems. Perhaps the very fact of poverty bears little importance and the determinants of high crime levels, teenage pregnancies, health problems and high infant mortality ought to be sought somewhere else.

This is the viewpoint of Richard G. Wilkinson. Wilkinson is a British epidemiologist who for 30 years has been studying the factors responsible for the health of entire populations. He observed⁴ that the health of populations does not result from an objective, measurable financial status people live in, but rather from coefficient of relative economic differences between individuals living within the same population or country. The countries of considerable income differences and, consequently, of a high degree of social inequality and a low degree of coherence, demonstrate a high proportion of health problems, such as common obesity or higher frequency of mental illnesses, e.g. depression. The health of the population of “hyper-consumption” countries such as the United States or Great Britain, where the development of “casino” capitalism contributed to a very high income inequality, is worse than the health of the population, assessed as a whole, in countries like Sweden or Japan, where income range is far lower than economic inequalities in the USA or Great Britain.

The principles by Wilkinson attracted the attention of scholars and the media in the time of today’s recession, caused both by the actions of the richest individuals (like dishonest investment bankers) and the current ultra-liberal social values which account for a high level of inequality. In his latest book entitled *The Spirit Level* (written with Kate E. Pickett, an epidemiologist⁵), Wilkinson proves that income inequality, resulting from the development of contemporary capitalism, is responsible for the increasing scale of social problems which are demonstrated by striking numbers: of people in penitentiary, cases of mental illnesses, people suffer-

² Ch. Murray, *Losing Ground*, op.cit.; K. Auletta, *The Underclass*, New York 1982.

³ E. Katz, J. Rosenberg, *Rent-seeking for Budgetary Allocation: Preliminary Results for 20 Countries*, “Public Choice” 1989, No. 60; M. Olson, *The Logic of Collective Action: Public Goods and the Theory of Groups*, Cambridge 1967; S. De Vylder, *The Rise and Fall of the Swedish Model*, “Occasional Paper” 1996, No. 26, http://hdr.undp.org/en/reports/global/hdr1996/papers/stefan_de_vylder.pdf.

⁴ R.G. Wilkinson, K. Pickett, *The Problems of Relative Deprivation. Why Some Societies Do Better than Others*, “Social Science & Medicine” 2007, No. 65, p. 1996.

⁵ R.G. Wilkinson, K.E. Pickett, *The Spirit Level. Why More Equal Societies Almost Always Do Better*, London 2009.

ing from obesity or those who do not trust public institutions. According to Wilkinson and Pickett, the correlation between the scale of social inequalities (measured by Gini Coefficient and Income quintile share ratio) and the percentage of people imprisoned, individuals of racist attitudes or teenage pregnancies, carefully found and thoroughly listed, prove to be stable and constant to the extent that a strong causal connection can be observed on a universal scale, regardless of the set of data referred to. Although Wilkinson's book is the summary of thirty years of his scientific work carried out with the use of various research findings (obtained from over two hundred different sources), Wilkinson and Pickett have found the strongest arguments for their concept in the results of the research for the World Bank on fifty richest countries of the world. Nevertheless, they claim that their findings can be generalized and successfully applied to the analysis of social problems of the countries not taken into consideration in the research of the World Bank.

Therefore, the assumptions by Wilkinson and Pickett deserve serious attention and the correlation between income range and the intensification of disadvantageous social phenomena they discovered (which is referred to as "the Spirit Level concept") ought to be proved actual in the context of the European Union member countries in the light of data of the European Social Survey (ESS) which has been carried out since 2002.

If, according to the findings by Wilkinson and Pickett, income inequalities or their lack in a society are conditioned by other phenomena or processes such as health (including mental health) or tendency for criminal behaviour, it is worth analysing the relations between other (apart from the so-called public health) key features for appropriate social functioning and income distribution. It is therefore the question of the possibility of generalization of the Spirit Level concept, the range of its universality in the context of the phenomena that constitute the foundation of social, multidimensional prosperity. The first important phenomenon of that kind is trust, understood both as the relations among individuals as well as in the sphere of people-institutions relations. The second element would be social activity measured by the participation in voluntary organizations. The low level of engagement in such activities is commonly understood as social problem – an undesirable symptom of disappearance of citizen-feelings in democratic societies.

Within the test of Wilkinson and Pickett's findings we will therefore analyze the relation between trust (which they worked⁶) and social activity (which was not the

⁶ R.G. Wilkinson, K.E. Pickett, *The Problems of Relative Deprivation*, op.cit.; eadem, *The Spirit Level*, op.cit., pp. 52–58.

subject of their concern) with income inequalities distribution. We will also try to determine if the level of trust is actually, as the authors suggest, correlated with income range, after “dismantling” the notion of trust (enabled by means of detailed questions asked the respondents as a part of ESS program), so verifying the universal dimension of the Spirit Level concept. Furthermore, we will investigate if the Spirit Level concept is true for social activity, the phenomenon Wilkinson and Pickett did not take into consideration, which is undoubtedly related to inequality and socially experienced exclusion.

2. The Spirit Level concept: reconstruction

According to Wilkinson and Pickett, the only key to understand social problems is not the actual level of poverty in a country or population (e.g. an extreme poverty rate) but a scale of social inequalities in that country, particularly the space between the first and the last quintile on income scale. Wilkinson and Pickett prove that the greater the income discrepancy between one-fifth of the richest and one-fifth of the poorest, the more the social problems: more obese people, higher infant mortality, more people residing in prisons etc., and what is important and interesting in this concept – all problems occur regardless of the “quality” of poverty and wealth.

Poverty may have many faces thus it might seem that, for instance, infant mortality is higher where poverty is more common and where poor people cannot afford to buy the most necessary things and often suffer from starvation. From the perspective of a poor citizen of the Czech Republic, American poverty is simply prosperity. Infant mortality in such “prosperity” of the American poor (who at least afford highly caloric food) ought to be lower than infant mortality of the Czech poor, who often cannot afford to buy any food at all. Meanwhile, Wilkinson and Pickett’s statistic analysis clearly demonstrates that the real face of poverty is not important. An essential factor is the distance, which in a specific country or region separates the poorest from the richest, the distance that generates the feeling of exclusion from the consumption of high-status artifacts, not the actual poverty of the poorest or the actual scale of wealth of the wealthiest. Infant mortality is therefore higher not where poverty adopts a dramatic face, but where the most spectacular social inequalities exist.

Income range is at the same time an indicator and determinant of social stratification scale. The income range is also directly proportional to the scale of problems appearing in a country. The higher the income range, the greater the problem scale.

Taking all the assumptions into account, in one of their works⁷ (2007) and with reference to the data from *United Nations Development Program of 2003 (Human Development Indicators)*, Wilkinson and Pickett analyze the situation in 24 countries. The income inequalities of these countries were measured as the relation of yearly incomes of one-fifth of the poorest to yearly incomes of one-fifth of the richest. The relation hesitated from 3.4 in Japan (the country of the flattest income structure) to 9.7 in Singapore, the country of the most stratified structure in respect of yearly incomes.

As a result of a detailed data analysis it turned out that regardless of the indicator taken into consideration, the individuals from the countries with a flattened income structure manage much better than the individuals from highly stratified in respect of yearly incomes countries. In other words, highly stratified in respect of yearly incomes societies are socially dysfunctional on many levels and within many spheres. Such a situation is present in the case of social mobility, the existence of mental illnesses in a population, and people residing in penitentiary.

Wilkinson and Pickett measured social mobility with the use of the correlation between the incomes of fathers and sons (at the time when the sons were in their thirties). The higher the correlation between the father-son incomes, the lower the level of inter-generation social mobility. Despite the fact that Wilkinson and Pickett vested with the data from only eight countries, they observed that the relation between inter-generation social mobility and income range is statistically important. The countries of high income range (USA and UK) proved to be simultaneously ones in which the level of inter-generation mobility is the lowest. In other words, in egalitarian countries with low income range, such as Sweden, Finland and Norway, social promotion of children is definitely easier and social status is not subjected to one's birth (in our opinion, these findings confirm the latest data of OECD⁸).

Similar relation was discovered in the case of the number of people residing in prisons or suffering from mental illnesses. The greatest number of the imprisoned out of 100 thousand citizens was observed in the most stratified in respect of yearly incomes countries – in the USA (576 people) and in Singapore (about 350 people). Again, the most egalitarian countries (Japan, Finland, Sweden, and Norway) can take pride in having the smallest number of the imprisoned individuals (about 50 out of 100 thousand citizens). The relation between income range and the existence the cases of mental illnesses in population is stronger, the most clear and distinct. In the least stratified Japan only 5% of the whole population suffer from a random mental disease whereas in the extremely stratified United States

⁷ R.G. Wilkinson, K.E. Pickett, *The Problems of Relative Deprivation*, op.cit.

⁸ *Growing Unequal? Income Distribution and Poverty in OECD Countries*, OECD 2008.

– as much as 25%. At this point of consideration, raises a serious doubt if this clear relation is not accidentally the result of “the culture of couch” in the United States, where it is “trendy” to treat mental disorders, such as depression, with the help of psychoanalyst or strong tendency favoring non-revealing own mental problems in Japan, where the rules of social coexistence are in this respect completely different. The statistics in this regard may not reflect the entire truth on the real scale of problems of Americans and the Japanese.

Moreover, Wilkinson and Pickett claim that the higher the gap between the possessors and non-possessors, the more the attention is drawn to the material aspects of consumption. Therefore, the brand of a car means a lot in Australia and in the United States (the countries of a substantial income range), but much less in Sweden or in the Czech Republic (in which exists relatively small social inequality measured by income range). The material aspects of consumption are noticeable symbols of economic and social status in highly-stratified cultures. Their lack is evidence of social uselessness or just the lack of success among the individuals. For this reason, no one, according to Wilkinson and Pickett, wishes to join the group of people who do not possess appropriate symbols of status.

We observe here the mechanism of a reference group and the feeling of a relative deprivation, known in sociology from the Second World War. The problem all highly-diversified societies struggle with is the fact that the individuals from the group of the lowest incomes compare their incomes, lifestyle and general life situation not with the people similar to themselves but with those who earn the most in the entire population. The mechanism was discovered by a Harvard economist, a researcher of hyper-consumption conditionings in the United States, Juliet B. Schor⁹. Americans, from the second half of the 1970's, have been changing their reference groups at the same time having continual sense of being socially handicapped. They no longer compare each other in respect of incomes or owned status assets with people from the closest neighborhood. They compare themselves with wealthy people they see at the workplace or in media. The development of media in modern societies has contributed to the fact that anyone can run into messages that illustrate incomes and lifestyle of the richest. Furthermore, such a situation produces various problems among people who are not able to live up to the requirements of growing rich at all costs and, due to the possession of inappropriate habitus¹⁰, are not able to jump on “a social sequoia” of incomes. In the opinion of Wilkinson and Pickett, in such situations the level of stress hormone – cortisol –

⁹ J.B. Schor, *Overspent American. Why We Want What We Don't Need*, New York 1998.

¹⁰ R.G. Wilkinson, K. Pickett, *The Problems of Relative Deprivation*, op.cit.

rises. It is generally higher in the case of the individuals in stratified societies, which is connected with a constant necessity to compare to someone. People living in such societies look at their social status with anxiety and this might be the reason for their escape either in drugs or making efforts to obtain status goods (meaning – on macro-level – intensification of delinquency) in “alternative” ways.

In a situation like this, the poorest are not the only ones who lose. For the persons with average and high incomes it is also very disadvantageous. High level of delinquency directly affects the earning individuals. High infant mortality and poor health conditions of a large part of population (both physical and mental) imprint negatively on insurance, health and pension systems, as well as on “quality” of the employees and their work. The flattening of income hierarchy, “obligatory” in such countries as Sweden or Norway, is therefore followed by real social profits. “The similarity of incomes” favors establishing stable existence in the framework of the reference structure which is located within the scope of the aspiring individuals. It also creates favorable conditions for building trust and tolerance.

3. The Spirit Level concept: criticism

Having familiarized with the Spirit Level concept, the following questions occur: is this “theory of everything” actually true? Is it possible to classify its universal dimension with the use of reliable data, different from the ones their authors used? The authors themselves seem to suggest that the negation of their findings, in the face of the data they gathered from two hundred, very serious, sources, is practically impossible.

The next questions concern precautionary measures proposed by Wilkinson and Pickett. Can real social problems be prevented from developing by eliminating large income gaps in a society? Is it enough to curb the concentration on oneself and achieving higher and higher incomes at all costs (for instance, at the cost of holidays or resignation from both private and professional life) characteristic for hyper-consumption societies and flatten the differences in incomes so as to successfully dispose of the problem of obesity, depression or inequality within the scope of school accomplishments?

Reconstructing the Spirit Level concept in her review of Wilkinson and Pickett’s book, a “Guardian’s” publicist, Lynsey Hanley wrote¹¹ that if the British concen-

¹¹ L. Hanley, *The Way We Live Now*, “Guardian” 2009, 14 March, <http://www.guardian.co.uk/books/2009/mar/13/the-spirit-level>.

trated on settling the level of people's incomes (and flatten a payment hierarchy to the model applied in the Scandinavian countries or Japan), they would get additional weeks of holidays a year, they would be much slimmer, live longer and trust each other more. The only question one might ask is – at what cost?

Wilkinson and Pickett answer this question on the web page of *Equality Trust* organization and in the last part of their book¹². Despite their reassurance that they are in favor of a gradual, evolutionary transformation, one may have the impression that the measures they promote are revolutionary by nature. Some of them simply make the reader think of the tendency of the authors to extremely leftist political solutions. Namely, they write (if we understand them correctly) that the situation could be simply healed by means of political manipulations as a part of tax system (in order to make it resemble the Swedish system) and reduce (in reality) the excessively high and unjustified incomes of the richest, for instance top-level managers, by introducing an upper limit for incomes (supported with the restrictions of so-called business expenses). Instead of dealing with inefficient in many cases “treatment” of particular social “diseases” such as the risk of teenage pregnancies, the increasing level of delinquency or constructing special and expensive policy against education exclusion, we ought to rely, in the opinion of Wilkinson and Pickett, on the simplest mean – the reduction of income gap in non-egalitarian societies by transforming the tax system. If egalitarian societies, such as Sweden, manage the majority of social problems more successfully, why not apply their real weapon (flattened income structure) somewhere else?

The ways of soothing social problems by flattening income structure proposed by Wilkinson and Pickett are therefore one of the strands that should come in for criticism. After all, it is impossible to leave the socio-political instruments that contribute to achieving the conditions of egalitarian social structure without a single comment. Not all countries, say for historical reasons and common values resulting from, e.g. historical determinants, are generally “up to” select leveling incomes as a means to soothe social problems. For example, Scandinavian *welfare state* and its success was an effect of, for instance, history and specific national heritage translated into appropriate priorities in social politics, such as the development of human capital through investments in professional qualifications and education, stability of power, consequently established consensus around collective responsibility based on heavy tax charges (meaning the famous citizens' sense of community called *folkhemmet*), in exchange for vast social guarantees connected to the citizenship (regardless ones wealth), inscribed in *the principle of income*

¹² R.G. Wilkinson, K.E. Pickett, *The Spirit Level*, op.cit., pp. 229–265.

security. Therefore, social solidarity and consensus help to eliminate inequalities, simultaneously strengthening themselves on the basis of the experienced egalitarianism. Nevertheless, it seems that the successful fight with social problems may require hundreds of years to develop the counterparts of *folkhemmet* in other countries. The very “mechanical” introduction of the appropriate tax instruments in a country where the values of “a Sweden type” are a foreign body, will result in nothing but potential deepening of social tensions or “evaporation” of the highest incomes to tax paradises.

Wilkinson and Pickett argue¹³ that they are not interested in the manner of approach towards the matter of equality but the equality itself. Meanwhile, the way of “flattening” inequalities is very important and ought to depend on for instance the stage of economic development of a country. One can only imagine the outbreak of social opposition in extremely individualized Poland if the politicians decided to tighten the already tight tax girdle. In countries such as Poland or Hungary, there is no economic cake big enough to divide within the framework of the reconstruction of the entire tax system. With the present level of GDP in these countries, the measures proposed by Wilkinson and Pickett to soothe inequalities are impossible to apply. The recent introduction of a linear tax in Sweden seems to prove the theory that developing countries cannot uncritically take advantage of all the instruments suggested by the authors of the Spirit Level concept. Meanwhile, they can draw more careful attention to other precautionary measures available in the tool box of Wilkinson and Pickett, for instance, strengthening the role of voluntary associations or non-profit/social benefit organizations (which provide their members with various services, from housing associations to universities) or trade unions, role of which practically collapsed (and in such countries as Poland additionally transformed into instruments of deepening inequalities since they serve exclusively well-earning members of the unions’ management).

The next doubt: if after “the process of reducing” the income gap carried out even with the use of radical transformations of tax system, following the example of the model present in the Scandinavian countries, would automatically diminish the level of delinquency, teenagers would be less likely to give birth to children and everyone’s bellies would be less fat? Unnecessarily. The level of stress hormone raises when confronted with social aims that are beyond the reach of an individual (if it was to be realized only in socially accepted, non-deviant way). The problem is not the very existence of the rich but their over-presence and excessive display in media. In order to realize the ideal demands of originators of *Equality*

¹³ Ibidem, p. 237.

Trust, undoubtedly media that present a consumptive lifestyle and promote earning money at all costs as a non-problematic good, ought to be dealt with. Therefore, programs such as *MTV Cribs* (in which celebrities show the viewers around their a few-hundred, extremely expensive mansions and home car parks full of awfully expensive cars) should be eliminated first. A possible explanation for the extreme level of delinquency in the USA is not only the accessibility of gun but also mass media pressure on the promotion of a consumptive lifestyle and presentation of financial success of the celebrities. One should rightly fear if the changes within tax system that may lead to the flattening of income gap will not be followed by changes in axio-normative system functioning in a population or country. After all, the values “managing” behaviors will not change – e.g. in Great Britain – along with equalization of incomes (if such equalization was politically possible).

As we have already pointed out, the Scandinavian tax systems did not come out of nowhere. They are economic effects of specific common values respected in such countries as Sweden, Denmark or Norway. The egalitarian tendencies and manifested in macro-scale “reluctance” to low social coherence and low level of solidarity decided in their case on this particular construction of economic system. Not the other way around. Therefore, the very transformation of a tax system carried out in order to flatten income range will not be much of a help in countries such as Australia, the United States or Portugal. The cultures differ from one another, sometimes diametrically¹⁴. Plausibly, the underlying reason for all social problems in the developed societies is high income range; nevertheless, it does not mean that this problem can be solved with the use of the same measures everywhere. These are the systems of values that promote and reward particular behaviors. There are such systems and such cultures which traditionally reward individualism, personal achievements, and economic success measured in houses, cars and trips to exotic places. These systems, the effect of hundreds years of development and the influence of specific ideology or religion, are responsible for high income range. Therefore, they – the axionormative systems – have to undergo transformation in order to improve the entire situation. However, there still remain justified fears that even the economic crisis will not switch the Americans to another line of thought.

After making acquainted with the theses by Wilkinson and Pickett, a doubt of a different kind raises: what about social problems that cannot be measured with the use of simple methods? What about *hikikomori* in Japan, which is not noted on the level of statistics? Maybe the Japanese culture, although it is practically a little-diversified society in respect of incomes, is struggling with social problems unidentified

¹⁴ G. Hofstede, G.J. Hofstede, *Cultures and Organizations: Software of the Mind*, McGraw-Hill 2004.

by the epidemiologists Wilkinson and Pickett? Maybe the Japanese are a highly-diversified society but not in respect of incomes but culturally and socially? Maybe there are some barriers that cannot be noticed on the level of statistics? Maybe an enormous emphasis put on educational and professional achievements in Japan that generates a substantial number of the excluded (for instance, because of *hikikomori*) is not measured by means of a simple tool such as Gini Coefficient?

The Spirit Level concept has a great power of seduction since it offers relatively simple, supported with truly striking set of statistics, explanation of social problems many countries have been unsuccessfully struggling with. The additional “power of seduction” of the concept comes from the crisis and general belief that it is the result of greed and rapacity of the richest. “The Spirit Level concept” splendidly inscribes in “critical public feelings”. However, is this theoretical tool really so infallible and one-hundred-per-cent predictable? Let us look into this matter.

4. Research problem, hypotheses, source of data and method of analysis

In the present case study we concentrate exclusively on the analysis of phenomena hardly signalized in the works by Wilkinson and Pickett, such as trust and social activity. ESS creates the opportunity to examine trust in its various dimensions. We are able to look into the correlations between social inequality measured with the help of Gini Coefficient and the trust of particular nations of Europeans in: 1) their legal system, 2) politicians they vote for, 3) the police and 4) other people. Thanks to ESS, we are also able to familiarize with the relations between social inequality and social activity measured by the participation in associations and organizations.

We concentrate on these matters since Wilkinson and Pickett are generally interested in the phenomena which are, either directly (infant mortality, the percentage of people struggling with mental diseases) or indirectly (teenage pregnancies, the percentage of people residing in penitentiaries), related to public health. It seems interesting if the correlations they noticed are really present in the niches other than health or physical condition of the entire population. Are all the problems social politicians and social workers deal with results of extremely unequal income distribution?

Two hypotheses, both in accordance with the reasoning and findings by Wilkinson and Pickett are to be suggested:

1. The greater the income range in a country, the weaker the trust in legal system, politicians, police and other people.

2. The greater the income range in a country, the smaller the social activity measured by active participation in voluntary associations.

As a part of our analysis, we use widely available ESS data¹⁵. So far, there have been three ESS' tours – in 2002, 2004 and 2006. In the present work, we focus on the data obtained in 2004. We do that in order to examine the situation long before the economic recession, when all European countries were entering the phase of an economic growth and the answers of the respondents were supposedly not tormented neither by extreme optimism connected with a bull market or extreme pessimism related to the economic crisis we experience nowadays.

Analyzing the correlation between the level of trust in a country and the income gap, Wilkinson and Pickett make use of the data from the European and World Values Survey gathered between 1999 and 2001¹⁶. Within the frameworks of the research project the respondents are asked to take a stance on the following sentences: "The majority of people can be trusted". Since as a part of ESS, that we use in the present work, the opinions of the respondents were also examined (not only countable facts, such as the number of people in prisons), additionally, the opinions were examined in a much the same way. Using similar questions we assume that the results of our analyses fully cover the results obtained by Wilkinson and Pickett.

The diagnose of income inequality scale in particular countries is carried out with the use of Gini Coefficient. It is a well-known fact that this coefficient indicates income inequalities of a society members. It ought to be interpreted taking into account that the higher the index worth, the greater the inequalities in a country. The value of Gini Coefficient does not illustrate the incomes of people in a country and is not connected with the amount of GDP. The value of Gini Coefficient in the world oscillates between 0.24 and 0.71. As we all know, the worth of 1 (relatively 100) would be possible if only one household would have an income, and the worth of 0 (relatively 00) in the situation when all incomes would be equal.

The research of ESS was implemented in 20 European Union countries: Austria, Belgium, the Czech Republic, Denmark, Estonia, Finland, France, Spain, Holland, Ireland, Luxemburg, Germany, Poland, Portugal, Slovakia, Slovenia, Sweden, Hungary and Great Britain. In case of these countries we dispose of both the results of

¹⁵ R. Jowell and the Central Coordinating Team, *European Social Survey 2006/2007. Technical Report*, London 2007.

¹⁶ R.G. Wilkinson, K.E. Pickett, *The Spirit Level*, op.cit., p. 53.

ESS research and Gini Coefficient measured for the same year, 2004 (*The Social Situation in the European Union 2008*).

In accordance to the theses of Wilkinson and Pickett, we ought to assume that a society of substantial inequalities is at the same time a land of no trust and lack of social activity. In order to conduct the test of the Spirit Level concept, we therefore compare Gini Coefficient with the answers obtained from ESS respondents form the questions related either directly or indirectly to the matter of trust and social activity.

The definitions of trust constructed before emphasize its multidimensional nature and role in social life. Piotr Sztompka and James Coleman draw attention to the fact that trust is a kind of wager made by rational individuals in order to define and foresee unpredictable behaviors of other people¹⁷. This wager is based on the assumption that another individual in his/her action will either take our good into account¹⁸, or that the actions will be advantageous to us¹⁹. The basis of trust is good will and positive intentions of the other subject²⁰, and its real representation – regular, honest, cooperative behaviors of others in accordance with the developed norms²¹. We can therefore trust people, organizations and institutions on the basis of the assumption that they function normally, diligently, in a non-egoistic and well-thought-out manner, in order to avoid acting to our detriment. Such definition of trust establishes the basis of social capital, which in turns constitutes natural building material of social order along with its benefits, originated in virtual communities in which people's trust contributes to the ability to define joint aims and cooperate to realize them.

Common social trust in people and institutions is a foundation of prosperity, stability in the sphere of social relations, social stability through general precautionary measures and acceptance of actions of socially scattered benefits. Trust, as an instrument of positive bond between group members, guarantees coherence of a group²², whereas as a part of so-called *social cohesion theory* it is treated, next to social bond, identity, loyalty, social engagement and network of relations, as a pen-

¹⁷ P. Sztompka, *Trust: A Sociological Theory*, Cambridge 1999; J. Coleman, *Foundations of Social Theory*, Cambridge 1990.

¹⁸ N. Lin, *Social Capital: A Theory of Social Structure and Action*, Cambridge 2001.

¹⁹ B. Misztal, *Trust in Modern Societies*, Cambridge 1996.

²⁰ A.B. Seligman, *The Problem of Trust*, Princeton–New Jersey 1997; J. Dunn, *Trust and Political Agency* [in:] *Trust: Making and Breaking Cooperative Relations*, D. Gambetta (ed.), Oxford 1988.

²¹ F. Fukuyama, *Trust: The Social Virtues and the Creation of Prosperity*, New York 1995.

²² J. Moody, D.R. White, *Structural Cohesion and Embeddedness: A Hierarchical Concept of Social Groups*, "American Sociological Review" 2003, No. 68.

etration one another guarantees of high quality of common life, resulting in social coherence²³. Therefore, trust is connected with social prosperity, which stems from the existence of social coherence. Not without a reason contemporary social policy of the European Union concentrates on preparing the foundations for social coherence²⁴. What is important, the path to coherence and prosperity is supposed to be establishing the European society of trust.

The second foundation of a democratic society analyzed next to trust in the present case study is social engagement equated with social activity. The societies of prosperity are usually those whose citizens “take matters in their own hands” and engage in the activity of voluntary associations and organizations of the third sector²⁵. We may suspect that the fewer citizens showing social activity, the more social inequalities encountered in a country. On the other hand, the more egalitarian a country, the more citizens have the sense of meaning of personal participation in the creation of common aims and the more often they involve in the activity in voluntary associations. By contrast, in the countries with considerable inequalities, citizens may have the feeling of lack of influence on the course of events. They may suspect that only the rich (meaning people who at the same time own appropriate resources and qualifications, if we use the terminology of Ralph Dahrendorf²⁶) influence the course of time, therefore it is no use trying for the sake of common good since the only good worth taking care of is our own and the one of our relatives. The lack of egalitarianism may thus cause loath to engage in the work of associations, voluntary work centers or political parties, which – in the conviction of some – realize only the business of the rich.

5. Trust and social activity versus income range in the light of ESS data

Therefore, do the answers of the respondents gathered as a part of ESS confirm the existence of the relation between income inequality and the declared trust in people and institutions?

²³ N.E. Friedkin, *Social Cohesion*, “Annual Review of Sociology” 2004, No. 30.

²⁴ *Growing Regions, Growing Europe*, Fourth Report on Economic and Social Cohesion. European Union 2007.

²⁵ R. Inglehart, Ch. Welzel, *Modernization, Cultural Change, and Democracy: The Human Development Sequence*, Cambridge 2005.

²⁶ R. Dahrendorf, *Modern Social Conflict: An Essay on the Politics of Liberty*, Berkeley and Los Angeles 1989.

The problem of trust in other individuals concerns two questions asked within the framework of ESS. The first, according to the respondents, was taking attitude towards the conviction that “in contacts with other people, never enough caution”. The second question in turn was taking attitude towards the thesis that “at any opportunity, the majority of people would like to take advantage of us”. We are of the opinion that these are excellent indicators of trust in other individuals. The obtained results are illustrated in Figure 1 and 2.

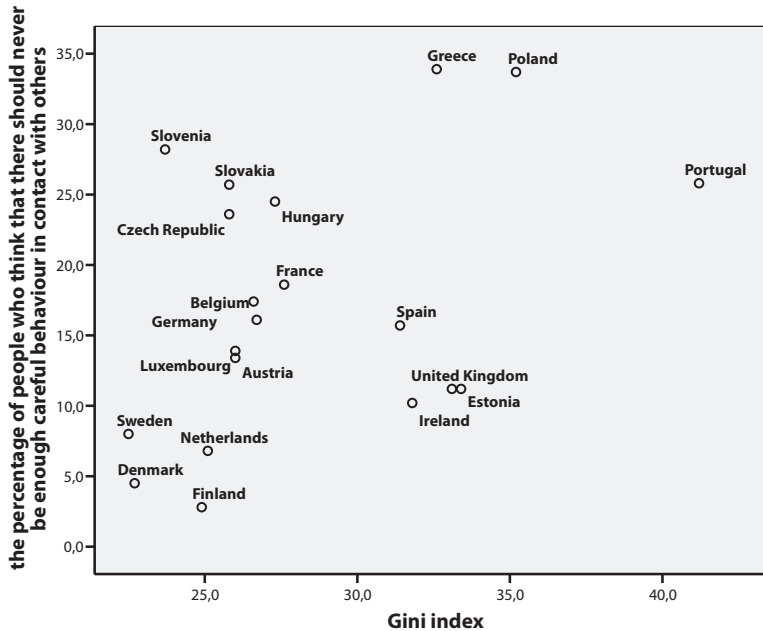


Figure 1. Gini Coefficient and the percentage of people who think there should never be enough careful behaviour in contact with others

The indicator of Pearson’s linear correlation for Gini Coefficient and the percentage of people declaring caution in contacts with other people equals $r = 0.397$ (with bilateral importance $p = 0.83$). It means that in the researched group of the countries we diagnosed, an average force of relation between important variables, nevertheless, is the relation of no statistic importance, which means that it does not allow generalization.

Apparently, the potential relation between the lack of inequalities and trust exists with reference to the extremely egalitarian countries: Denmark (here, hardly 4.5% of the respondents declare caution in contacts with other people), Finland (2.8), Holland (6.8) and Sweden (8.0) as well as highly stratified countries: Greece

(as much as 33.9% of the respondents declare caution) and Poland (33.7). Nevertheless, it turns out that in egalitarian, in respect of income, post-communist countries – the Czech Republic (23.6), Slovenia (28.2) and Slovakia (25.7) – as well as in Hungary (24.5) of average incomes, almost the same percentage of the respondents declare caution in contacts with other people (in other words, lack of trust) as in the country of extreme inequalities, such as Portugal (25.8).

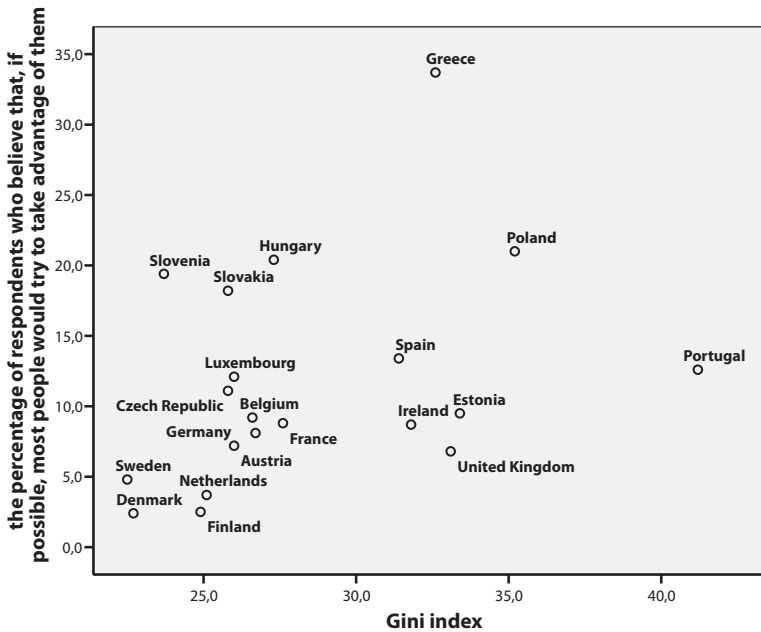


Figure 2. Gini Coefficient and the percentage of respondents who believe that if possible, most people would try to take advantage of them

The indicator of Pearson's linear correlation for Gini Coefficient and the percentage of people declaring the conviction that they might be taken advantage of at any occasion equals $r = 0.344$ (with bilateral importance $p = 0.137$). It means that in the researched group of the countries we diagnosed an average force of relation between important variables, nevertheless, it is a relation of no statistic importance, which means that it does not allow generalization.

Therefore, as far as the second question asked to the respondents as a part of ESS signaling the level of trust in a country is concerned, the potential relation between inequalities and trust occurs in the extremely egalitarian countries as well as in the strongly stratified ones. Among the analyzed countries, in Denmark and

Finland the lowest number of people are convinced that they would be used by others at any occasion (it is declared by – respectively – only 2.4 and 2.5% of the respondents). On the other hand, we notice that in average stratified in respect of incomes Hungary the respondents show significantly lower dose of honest intentions of other people (as many as 20.4% of the respondents are of the opinion that other people at the earliest opportunity will try to use them) than in similar to Hungary in respect of incomes France (only 8.8% of the French). Hence, the Hungarians who live in a relatively egalitarian country show less trust in other people than the Portuguese who live in a highly diversified country (12.6).

The trust in institutions concerns four questions asked to the respondents as a part of ESS (we will analyze only three of them, resigning from the analysis of the declared trust in the European Parliament). We therefore, in turn, work on the answers for the questions of trust in national parliament, the police and legal system. The results are illustrated in Figures 3, 4 and 5.



Figure 3. Gini Coefficient and the percentage of people declaring trust in national parliament

The indicator of Pearson's linear correlation for Gini Coefficient and the percentage of people declaring trust in parliament equals $r = -0.457$ (with bilateral importance $p = 0.043$). It means that in the researched group of the countries we

diagnosed an average force of relation between important variables. The correlation is statistically important on the level of 0.05 (bilateral).

There is, therefore, a certain statistically important relation between social inequalities and lack of trust in politicians. The trust in national parliament is the highest in Denmark (32.3% of positive declarations of the respondents), Sweden (19.5) and Finland (26.0). The least trust in their representatives in national parliaments have, living in highly stratified countries, the Portuguese (3.7) and Poles (1.9). What is interesting, we observe again a substantial distinctiveness of the post-socialist countries. For instance, a minimally higher level of trust in the parliament than in the egalitarian Czech Republic (3.6) reveal living in highly stratified country the Portuguese (3.7). A comparable lack of trust in politicians is therefore found in almost all post-communist countries we analyzed despite the fact that they significantly differ in terms of income range. Accordingly, we can draw a conclusion that the lack of trust in public institutions in Poland, Slovenia, Slovakia, Hungary and the Czech Republic is the heritage of few dozen of years of communing in hostile institutional and bureaucratic environment. Citizens of the post-socialist countries treat parliament similarly to the way they treat the police and legal system.

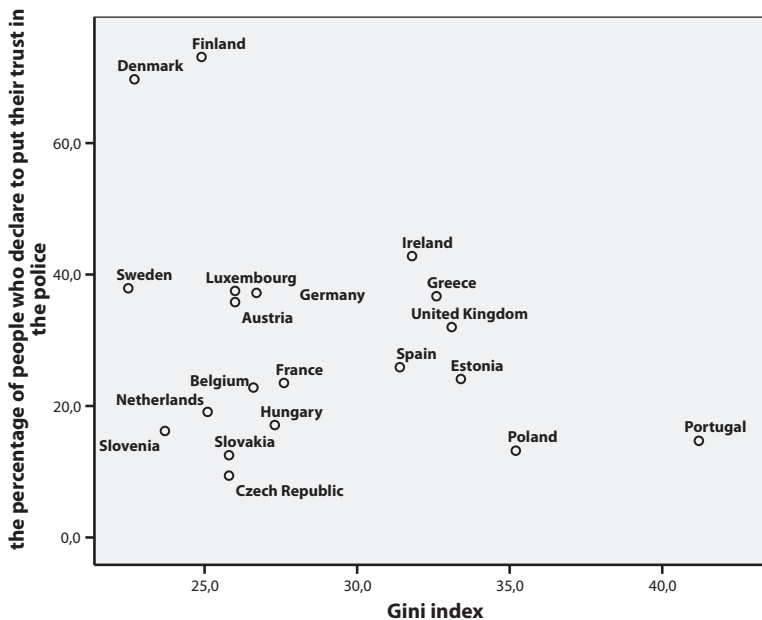


Figure 4. Gini Coefficient and the percentage of people declaring trust in the police

The indicator of Pearson's linear correlation for Gini Coefficient and the percentage of people declaring trust in the police equals $r = 0.319$ (with bilateral importance $p = 0.170$). It means that in the researched group of the countries we diagnosed an average force of relation between important variables, nevertheless, it is a relation of no statistic importance.

The police enjoy the biggest trust in egalitarian Finland (73.1% of positive declarations revealing trust) and Denmark (68.7). Interestingly enough, the countries of the most significant income inequalities located on the opposite side of the figure, which are Poland (13.2) and Portugal (14.7), are characterized by a slightly higher level of trust in the police than the egalitarian Czech Republic (9.4). Nevertheless, the strong separateness of the post-communist countries is emphasized again, which undoubtedly disturbs the correlation between trust and inequality. As a result, we can rightly suppose that after the exclusion of the post-communist countries, the correlations would be considerably stronger and additionally statistically important, which assumption is supported by the analysis of trust in legal system.

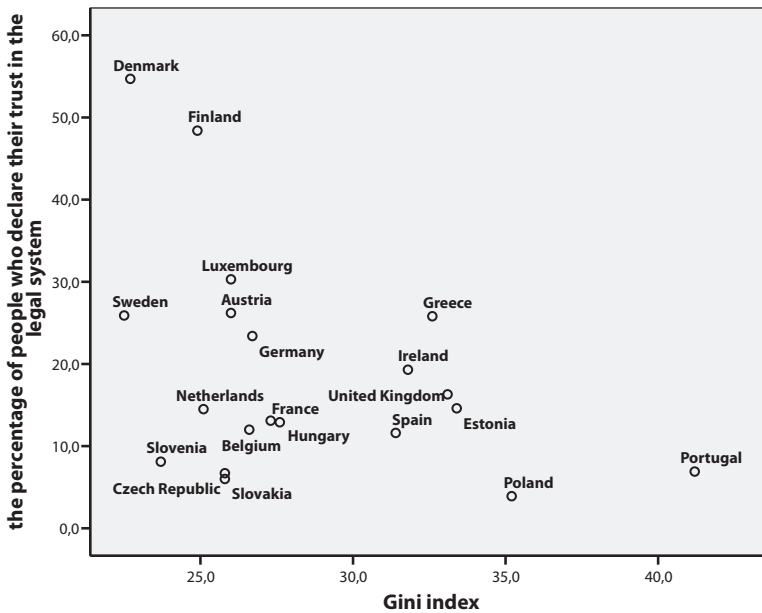


Figure 5. Gini Coefficient and the percentage of people declaring trust in legal system

The indicator of Pearson's linear correlation for Gini Coefficient and the percentage of people declaring trust in legal system equals $r = -0.427$ (with bilateral importance $p = 0.60$). It means that in the researched group of the countries we diagnosed an average force of relation between important variables, nevertheless, it is a relation of no statistic importance.

Similarly to the previous analysis, the elements that stand out are the "boundaries" of the figure – the most and the least egalitarian countries. The legal system enjoys the greatest level of trust in egalitarian Denmark (54.7% of the respondents declared their trust) and Finland (48.4). Living in strongly stratified country Poles reveal the least level of trust in legal system (only as much as 3.9). What is important, as far as the question of trust in legal system is concerned, post-communist but egalitarian Czechs (6.7) are minimally inferior to extremely stratified Portuguese (6.9).

The level of social engagement examines as a part of ESS the question of participation of the respondents in the works of associations and social organizations within the last 12 months. The results of the survey are presented in Figure 6.



Figure 6. Gini Coefficient and the percentage of people who declare to have been active in an association or organization within the last 12 months

The indicator of Pearson's linear correlation for Gini Coefficient and the percentage of people declaring social activity measured by participation in voluntary works of associations within the last 12 months equals $r = -0.557$ (with bilateral importance $p = 0.011$). It means that in the researched group of the countries we diagnosed a clear force of relation between important variables. The correlation is bilaterally important on the level of 0.05.

It turns out that even though strong correlation between trust and social inequalities diagnosed by Wilkinson and Pickett is not confirmed in our analyses, there is a clear relation between the level of income stratification and social activity (which the authors of the Spirit Level concept were not occupied with). In this competition, the egalitarian countries definitely win, such as Finland (31.2% of the respondents declaring activity in either associations or social organizations), Sweden (24.3) and Denmark (23.6). The Czech Republic, a country almost as egalitarian as Finland, falls far behind (hardly 8%), as far as the matter of the citizens' engagement in social activity is concerned. What is important, the citizens of "a middle" of income range, Hungary (1.9) are less socially active than the citizens of extremely stratified countries – Poland (5.7) and Portugal (2.6). Despite these differences, the distinctiveness of the post-communist countries again stands out. Letting along the differences in the level of egalitarianism, Poland, Estonia, Hungary, Slovakia, the Czech Republic and Slovenia can be ranked among the countries the citizens of which are not particularly active, in which competition only the citizens of strongly stratified countries – Greece and Portugal, are able to keep pace with.

6. Discussion

Do the presented data allow to demonstrate a linear, unquestionable relation between income inequalities in a country and the level of the declared trust in people and institutions? Our answer is: rather not.

As far as trust is concerned, it seems justifiable to claim that it ought to be treated as one of the conditions leading to (not resulting from) egalitarian income distribution, however, the very condition is definitely not enough. The highest level of trust in people, as well as in institutions, is observed among the citizens of the egalitarian countries, Scandinavian in particular. In these countries, on the basis of historical experiences, the politics of promotion of individual and intuitional credibility was built, so teaching and motivating to joint responsibility. The trust in these countries grew throughout the long process of establishing commu-

nity thinking and actions, which along with many other factors (mentioned before) translated into widespread (not concentrated) prosperity.

In the case of the post-communist countries, regardless the value of Gini Coefficient, the statement on the influence of communism on the level of trust seems justifiable. A low level of trust results from the inherited in the course of contemporary history distrust in the state and the instilled by apparatus of communist power lack of confidence in other individuals. In the search for common motifs, and at the same time relating to the towers of trust suggested by Piotr Sztompka²⁷, the historical experiences of post-communist countries determine present relations as well as – naturally – the widespread personal “closed to trust” constructions. According to Sztompka, trust is based on the relations and on the act of the assessment of other person’s credibility. The second tower is personality, meaning practical psychological tendency of the individuals to trust on the basis of own experiences. The last foundations of trust in social life are cultural rules, which are a historically accumulated record of collective experiences of a society. It means that among these three components of trust, historical experiences have the function of key importance. They constitute background for potential patterns of the relations between individuals and the relations between individuals and institutions, as well as widespread individualistic patterns of trust or distrust.

Therefore, the egalitarianism in the Czech Republic does not grow on trust, as well as a relatively high level of trust in republican (solidary) France, it does not translate into a flattened social structure. The greater doze of egalitarianism in Hungary towards Portugal is not based on higher level of trust in other people and institutions – the ESS data contradict this possibility. Even though it is easy to imagine that the similarity of incomes translates into the relations between people based on trust in someone who does not “stand out” from me in the sphere of material affluence and that such situation creates widespread individualistic attitudes based on trust, the data presented in the hereby case study do not allow indicating the lack of inequalities as the source of prevalent distrust among people and distrust in institutions. One of the key factors seems to be political and economic history with the results for psychological and social sphere. It may lead to inequalities with respect of incomes as well as generate the foundations of social trust.

Therefore, undoubtedly, the post-socialist countries, due to their historical distinctiveness and its present effects, definitely disturb the relation between Gini Coefficient and trust in the European Union countries. But for these historical experiences resulting in the lack of trust in parliaments, the police and courts, the

²⁷ P. Sztompka, *op.cit.*

correlation on European scale would be more visible and the Spirit Level concept could be confirmed.

It turns out that historical circumstances do not disturb clear correlation between income range and social activity. One can rightly claim that the highest the level of egalitarianism in a EU country, the weaker the wish of its citizens to participate in social life on the level of voluntary associations and organizations. Despite ascertaining this general relation, it is important to add that the heritage of communist system present 20 years ago in each of the analyzed countries of the Central-Eastern Europe, is the lack of engagement in the work of associations and social organizations, a peculiar loather to the activity of this kind which the egalitarian Czechs and extremely stratified Poles may still associate with political engagement. In each of these countries, in the times of real socialism, rich social traditions, which are not in the course of reconstruction, were suspended. Additionally, the lack of interest in social activity in strongly stratified countries of historical experiences completely different from the ones of Poles, also in Portugal, can be explained by “detention” of the catholic cultures within family sub-world (which is strongly connected with the lack of trust in everyone outside the family).

7. Conclusion

Although some correlation between the increasing social inequality measured by Gini Coefficient and diminishing trust (especially in Scandinavian countries, which are extreme with respect of income distribution, and – on the other hand – in Portugal) is noticeable, the historical circumstances and values respected in some countries decide on ponderable exceptions from the rule discovered by Wilkinson and Pickett. Despite the fact that it is generally possible to foresee the level of trust in a country on the basis of knowledge on its egalitarianism or stratification, the historical factors that disturb the mechanism developed by Wilkinson and Pickett have to be taken into account. What is interesting, the lack of social activity and participation in associations is considerably correlated with the scale of egalitarianism/stratification in all the EU countries we analyzed. Notwithstanding the ascertainment of these correlations, there is a justified fear that establishing an egalitarian country through flattening income range does not necessarily have to have the function of the stimulator of trust and civil activity. The values and rules of a social game respected in a society ought to undergo certain changes, as well, and this is never easy. The subtitle of Wilkinson and Pickett’s book is *Why More Equal Societies Almost Always Do Better*. Our case study emphasizes just one of these words – *almost*.

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SUMMARY

This article attempts to verify the findings by Richard G. Wilkinson and Kate E. Pickett (2009) which suggest a strong correlation between the inequality of income distribution and the citizens' life quality. According to Wilkinson and Pickett's thesis, here referred to as "the Spirit Level concept", all social problems (ranging from drug abuse, obesity to the closed channels of social mobility) are directly connected with the scale of social inequality in a country. The greater the income range is, the more intense the social dysfunctions are. In the present paper we challenge this thesis using the data of the European Social Survey. The Spirit Level concept is proved with reference to two phenomena which are essential to the functioning of societies – trust (in other people, the legal system, institutions and the police) and social activity (assessed on the basis of organizational activity). This concept has been tested in 20 countries of the European Union. Questioning the universal dimension of the Spirit Level concept, we demonstrate that although there is some correlation between the increase in inequality and the decline in trust (especially in the countries at the extreme ends of the income scale), historical context and moral values of countries determine significant exceptions to the principle by Wilkinson and Pickett.

Nevertheless, an evident correlation between the degree of social stratification and social activity is to be observed. The less egalitarian a country is, the weaker the willingness to actively participate in voluntary organizations.

Key words:

The Spirit Level concept, income range, income gap, inequality, trust, social activity