

The Development of Pensioners' Interest Organisations in Central and Eastern Europe: A Comparison of the Czech and Slovene Cases

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Abstract

Studies of organised interests in Central and Eastern Europe have overlooked constituencies shaped by the welfare state such as retired people. The article compares the development, structure and strategies of pensioners' interest organisations in the Czech Republic and Slovenia. It finds that sizeable, if poorly resourced, membership-based pensioners' interest organisations have emerged, largely independently of trade unions, and integrated into interest representation systems. Although lack of resources and organisational problems hamper lobbying capacity, these groups retain mobilisation potential. Comparison suggests that legacies and modes of transition still shape pensioners' interest organisations more than institutional structures or new population ageing strategies.

THE EXISTENCE OF DISTINCT AUTONOMOUS ORGANISED interests is central to the notion of a liberal-democratic polity (Schmitter 1992; Ost 1993, pp. 454–57; Baumgartner & Leech 1998). Indeed, Schmitter (2008, p. 199) goes so far as to suggest that interest groups are now the 'effective "citizens" of their respective democracies'. Unsurprisingly, therefore, studies of socio-economic interests and their representation and their linkage to policy makers have been a key strand of research on the development of the newer democracies in Central and Eastern Europe (Ost 1993; Padgett 1999; Pérez-Solórzano Borragán 2006; Cox 2007). Such research has, however, so far been curiously uneven. There is an extensive literature on organised labour (Pollert 1999; Crowley & Ost 2001; Kubicek 2004; Ost 2009; Myant 2010) and, to a lesser extent, employers' organisations (Myant 2000; Duvanova 2007) and other producer groups (Blažek 2002; Yakova 2004). However, while the importance of such groups in Central and Eastern European societies is undeniable, research on economic interest groups in Western democracies has long extended beyond those rooted in

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employment relationships or the production process, with welfare states, in particular, increasingly recognised as powerful shapers of interests, capable of generating powerful and distinct social constituencies. One such constituency, whose potential organised influence has attracted growing scholarly attention, is the large and growing proportion of older and retired citizens in contemporary European democracies (Walker 1998; Lynch 2006; Goerres & Vanhuyse 2011).

Although the literature on post-communist pension and welfare reform has often noted the existence of pensioners' associations (Müller 1999, 2002; Orenstein 2000), there has so far been little or no direct examination of the ways in which retired people in the region have been organised as an interest constituency. This is potentially a significant lacuna. As shown in Figure 1, older and retired people in Central and Eastern Europe, as elsewhere in the developed world, make up a large and increasing proportion of citizens, with population ageing driven by the same underlying factors of longer life expectancy and declining fertility (Mukesh *et al.* 2007). At the same time Central and Eastern Europe has a number of regional peculiarities which may shape the development of retired people in the region as an organised interest in distinct ways. In addition to communist regimes' destruction or nationalisation of historically evolved social organisations and their legacy of stunting subsequent civil society development (Howard 2003), Central and Eastern Europe also possesses a distinct conjuncture of demographic, economic and institutional factors, which merit a specific study of the regional patterns of age-related interest group development. As relatively poor societies with extensive welfare and pension systems they face twin challenges of adaptation to a market economy and reform as a consequence of demographic change and fiscal austerity.

In this article I seek to address this gap through comparative case studies of the development of older and retired people's interest organisations in two Central and Eastern European democracies: the Czech Republic and Slovenia. Although touching on the politics of pension and welfare reform, rather than seeking specifically to quantify their influence in particular policy processes, the article seeks to assess the development of Central and Eastern European pensioners' organisations more broadly as a distinct and under-researched interest group sector, examining and explaining how their organisational development and strategies of influence have been configured in particular ways. The main empirical focus of the article is thus on national self-advocacy organisations which represent the group interests of older and retired people without themselves becoming party-political actors. Although taking in developments since 1989–1990, the article deals mainly with structures and strategies of pensioners' interest organisations in the period 2001–2010, a time of rapid organisational and policy development, when wider European contexts had the scope to make themselves felt alongside the impact of transition and historical factors.

The article proceeds as follows. First, it discusses propositions regarding older and retired people in Central and Eastern Europe as an interest group found—or implied—in work on post-communist social policy reform and civil society development and in studies of Western seniors' groupings, reviewing key reasons for pensioners' (generally assumed) weakness as an organised interest in Central and Eastern Europe. It then presents the Czech Republic and Slovenia as particular cases before

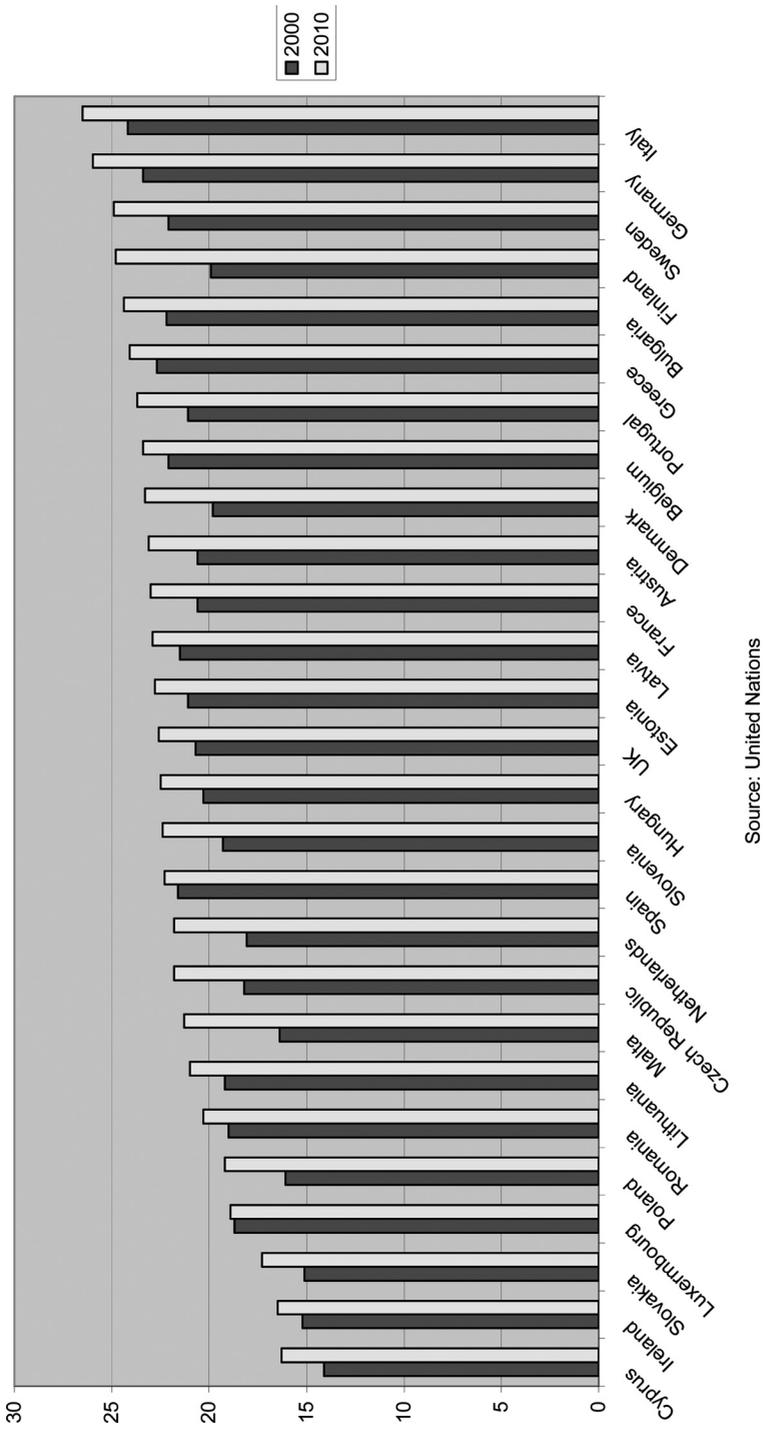


FIGURE 1. PERCENTAGE OF POPULATION AGED 60 OR OVER IN EU STATES. *Source:* compiled by the author from online data (specifically <http://data.un.org/Data.aspx?q=age+60&d=PopDiv&f=variableID%3a33#PopDiv>, accessed 20 August 2012) (United Nations 2011).

Source: United Nations

making a structured, focused comparison of the development of pensioners' interest organisations and their strategies across the two cases. Next, it assesses the historical, institutional and contextual factors that shaped these configurations, testing certain assumptions in the literature and highlighting and explaining differences and commonalities between the two states. The article concludes by considering the implications of the case studies for wider research on retired and older people's interest organisations in post-communist Europe and their likely prospects.

Pensioners as an organised interest in post-communist Europe

Pensioners in post-communist Europe are often depicted as an archetypically disempowered and impoverished group of 'transition losers'. However, while this is undoubtedly true for some states and sub-groups, the general picture is more complex. Although welfare systems were cut back in much of Central and Eastern Europe, retired people enjoyed relative stability and continuity in pension provision as the systematic reform of pensions was initially postponed (Müller 1999; Orenstein 2000; Vanhuyse 2006a; Orenstein 2008a; Bohle & Greskovits 2009). Indeed, Vanhuyse (2006a) argues that pensioners were among key groups of potential 'transition losers' that were deliberately cushioned by Central and Eastern European policy makers through 'strategic social policy' intended to 'divide and pacify' anti-reform constituencies and pre-empt mass social protest. Moreover, as the state remained the main provider of pensions and income for most retired people through public pension systems dating from the socialist period (Večerník 2006; Vanhuyse 2006a), and pensioners in the region were a large and relatively homogeneous group in terms of income and lifestyle, they faced, in the post-communist state, a stable, single and clearly defined interlocutor.

While size, homogeneity and a high shared interest in welfare and pension outcomes potentially facilitated interest aggregation and group organisation, at the same time retired people in the region faced a number of obstacles and disincentives to collective action and organisation. These were often more sharply posed forms of those facing retired citizens in many democracies: geographical dispersal; less extensive social networks; lower material resources in comparison with other citizens; higher turnover of members and leaders; lower capacity to disrupt social and economic life; and difficulty in framing a strong socio-political identity based on withdrawal from economic activity or entering the final stage of the life course (Pratt 1993; Walker 1998; Vanhuyse 2008; Wang 1999). Reviewing retired people's potential for collective action in Central and Eastern Europe compared with that of other groups, Vanhuyse (2008) concluded that pensioners' lack of material and network resources, lower physical strength and lack of prior organisation would hamstring their capacity for group action, inclining them towards 'peaceful voice' rather than contentious protest. Vanhuyse (2008) saw such 'peaceful voice' primarily in terms of older people's electoral participation, discounting interest group politics as likely to be impeded by many (but not all) of the constraints blocking disruptive protest, and likely to be further undermined by the weak levels of civic participation characteristic of economically inactive 'outsider' groups. Available empirical evidence and theoretical reasoning thus suggested that, while not wholly lacking incentives for collective action,

pensioners in post-communist Central and Eastern Europe would struggle to organise collectively to pressurise governments.

The Czech Republic and Slovenia as case studies

The Czech Republic and Slovenia are selected as 'most likely cases' (Eckstein 1975) in Central and Eastern Europe for the development of relatively strong retired people's interest organisations. Both made relatively early demographic transitions and, as Figure 1 shows, have high (but stable) proportions of older and retired citizens at the mid-range relative both to other Central and Eastern European states and EU members generally. Both also possess relatively high living standards and extensive and well-administered welfare states, which exemplify the distinct Central European pattern of post-communist social policy noted above (Večerník 2004, 2006; Vanhuyse 2006a). As illustrated in Figure 2 they thus have broadly maintained, while gradually reducing, the value of old age pensions relative to average wages. Both are established democracies with stable institutions which offer a predictable set of formal opportunity structures for the development of organised interest groups and, until the most recent elections (2010 in the Czech Republic, 2011 in Slovenia), had stable party systems with patterns of party competition centring on distributional conflicts, which are likely to facilitate and legitimise the development of economic interest groups, although the class nature of left–right divisions is more muted in Slovenia (Deegan-Krause 2006; Jou 2011).

The Czech Republic and Slovenia are, however, distinct within the Central and Eastern European region in having delayed—until recently—the adoption of systematic pension reforms in favour of parametric and incremental changes (Müller 1999, 2002; Guardiancich 2012). This reflects the stronger fiscal position of the Czech and Slovene public pension systems, the absence of strong majority coalitions committed to pension reform and, to a more limited extent, the ability of trade unions to mobilise public opinion against raising the retirement age (Müller 1999, 2002; Orenstein 2000; Guardiancich 2004, 2012). Despite the recent passing of legislation for systemic pension reform by governments driven by the imperatives of fiscal austerity, at the time this article was completed the fate of pension reform in both states was still uncertain.¹ What is certain, however, is that in both cases social policy areas of central concern to pensioners' organisations enjoyed continued and high political salience, potentially favouring their development. At the same time the historical and institutional contexts in Slovenia and the Czech Republic—such as the nature of the outgoing communist regime; the transition from communism; patterns of formal consultation and representation of interest groups; and levels of polarisation and fragmentation of the party system—vary in potentially important ways enabling cross-case comparison.

¹Legislation for systemic pension reform was passed by the Slovene National Assembly in December 2010, but subsequently negated by a referendum six months later. Meanwhile, in the Czech Republic, pension reform legislation to create a compulsory second pillar was introduced by the majority centre-right government of Petr Nečas and was passed by the parliament in November 2011. However, the government's loss of a reliable majority following splits in the small Public Affairs Party (*Věci veřejné*), make implementation of the reforms uncertain.

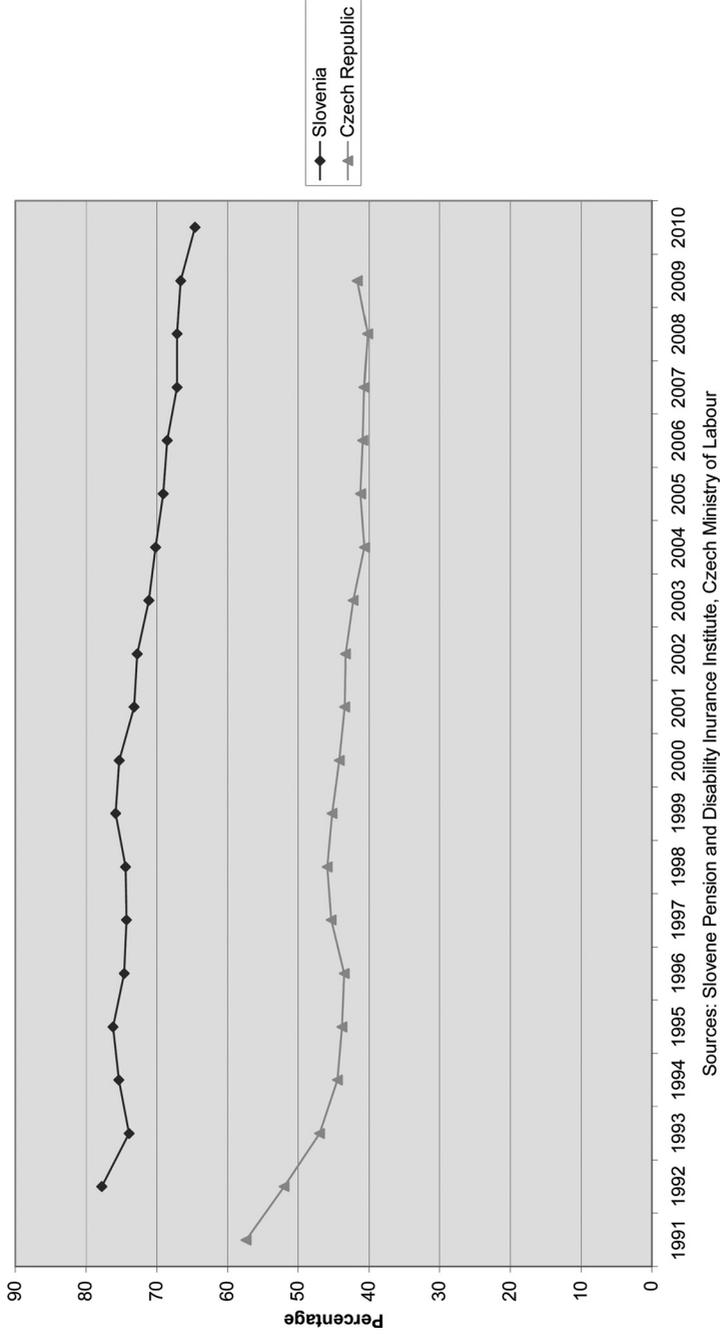


FIGURE 2. MEAN OLD AGE PENSION RELATIVE TO MEAN NET SALARY, 1991–2010. Sources: for Slovenia: compiled by the author from Zavod za pokojninsko in invalidsko zavarovanje Slovenije (2011, Table XI, p. 7); Zavod za pokojninsko in invalidsko zavarovanje Slovenije (2006, Table X, p. 4); <http://www.zpiz.si/wps/wcm/connect/c4e1798046526009db0ffb319c11ce/Monthly+Statistics+Overview-2010.pdf?MOD=AJPERES&CACHEID=c4e1798046526009db0ffb319c11ce>, accessed 20 August 2012; http://www.zpiz.si/wps/wcm/connect/8e19fd804409134ba97af9745e837060/en_msp_2005.pdf?MOD=AJPERES&CACHEID=8e19fd804409134ba97af9745e837060, accessed 20 August 2012. Zavod za pokojninsko in invalidsko zavarovanje Slovenije (ZPIZ) is the Pension and Disability Insurance Institute of Slovenia. For the Czech Republic: *Výzkumný ústav práce a sociálních věcí* (Research Institute for Labour and Social Affairs) (2012, Table II, p. 19); <http://praha.vupsv.cz/Fulltext/bullNo27.pdf>, accessed 20 August 2012. This institute is an agency of the Czech Ministry of Labour and Social Affairs which is the original source/compiler of the data.

Structures and strategies

In both the Czech Republic and Slovenia a range of interest organisations seeking to represent retired and older people developed rapidly after the fall of communism. Although there are no systematic comparative typologies of seniors' organisations, the forms of organisation which emerged in both states broadly paralleled the two most prevalent types of pensioners' self-organisation found in Western Europe: trade-union sponsored groupings and independent, territorially based associations (Evers & Wolf 1999). Umbrella organisations coordinating the activities of smaller pensioners' and seniors' groups were also identified as a relevant organisational form, especially in the Czech Republic. As in some Western European states, 'pro-senior' charitable organisations and NGOs providing services and advocacy for older people, but not seeking to represent them, were also present. The strategies of influence deployed by pensioners' interest organisations in the two cases broadly fit within the comparative typologies identified in the interest group literature on Western democracies. Most, to use the terminology of Binderkrantz (2005), were 'direct' strategies of contacting and consulting with officials and office-holders and lobbying legislators and parties, rather than 'indirect' strategies of mobilising members and supporters in campaigns and protests, or working to influence public and elite opinion through the media. The following sections compare and examine the principal pensioners' groups in the two cases in closer and more systematic detail.

Trade-union sponsored pensioners' groupings

Given their size, resources and ageing memberships, trade unions have often been seen as the most forceful advocates of the interests of pensioners in Central and Eastern Europe (Müller 1999, 2002; Orenstein 2000). Moreover, in much of the region, including the Czech Republic and Slovenia, trade unions' access to policy makers is specifically institutionalised through national tripartite bodies created in the early 1990s, whose remits include both economic and labour market issues and broader social policy questions (Myant *et al.* 2000; Fink-Hafner 1998; Lukšič 2003; Guardiancich 2012).² Of the two case studies examined here, Slovenia's tripartite institutions have usually been considered to be more strongly neo-corporatist (Bohle & Greskovits 2007; Guardiancich 2012); however, in both countries they have a role in reviewing draft legislation, and the Czech tripartite council's importance has arguably often been underestimated (Valterová 2006). Trade unions in both the Czech Republic and Slovenia have also possessed the organisational and mobilisational capacity to stage mass demonstrations and occasional strikes, protesting aspects of social and economic policy, including pension issues, a trend which has become more marked and widespread since 2008–2009 as governments

²The Czech Council of Economic and Social Agreement (*Rada hospodářské a sociální dohody*, RHSD) was created in 1990 while Slovenia's Economic and Social Council (*Ekonomsko-socialni svet*, ESS) was established in April 1994.

have imposed austerity measures and prioritised social policy reforms, often bypassing mechanisms for social dialogue (Guardiancich 2012).³

In both the Czech Republic and Slovenia the principal trade-union federations made an early strategic choice in the 1990s to seek to organise and represent pensioners. This was partly a response to membership decline stemming from economic restructuring—and, in particular, to large numbers of older workers leaving employment for retirement—and partly an aspect of broader adjustment strategies intended to extend unions' representative role to economically inactive, socially vulnerable groups. In the Czech Republic, for example, the principal union federation, the Bohemian–Moravian Confederation of Trade Unions (*Českomoravská konfederace odborových svazů*, ČMKOS), successor to the communist-era Revolutionary Trade Union Movement (*Revoluční odborové hnutí*, ROH), formally included the goal of 'influenc[ing] the formation and implementation of social policy including care for pensioners' in its statutes.⁴ The early activism of independent pensioners' associations (discussed below), which seem to have emerged very rapidly after the fall of communism, may also have played a role in alerting trade unions to the potential importance of pensioners as a constituency.

Central to this strategy in both cases was the creation of trade-union sponsored groupings to organise and coordinate retired members. However, the Czech and Slovene cases exhibit contrasting organisational strategies. In the Czech Republic in 1991 ČMKOS established the Association of Retired Trade Unionists (*Asociace důchodců odborářů při ČMKOS*, ADO) as a national advisory body for the '... defence of the rights, interests and needs of pensioners organised in trade unions' (ADO 2001, p. 2), who numbered an estimated 20% of the ČMKOS membership in 2009 (Myant 2010). The Association of Retired Trade Unionists thus represents some 90,000 retired trade unionists, a figure which, although much like the overall ČMKOS membership, falling in recent years. As a result ADO is now formally the largest representative organisation of pensioners in the Czech Republic.

In contrast to their Czech counterparts, Slovene trade unions did not (and do not) allow members to continue membership after retirement. Instead, in partial imitation of the model in neighbouring Italy, Slovene trade-union confederations have created distinct pensioners' unions. The Union of Free Trade Unions of Slovenia (*Zveza svobodnih sindikatov Slovenije*, ZSSS)—the largest Slovene trade-union federation which, like the ČMKOS, is the successor of the official communist-era union federation—formed the Trade Union of Pensioners of Slovenia (*Sindikat upokojencev*

³In 1994–1995 Czech trade unions organised mass petitions, a 15-minute symbolic strike and protest demonstrations against proposed increases in the retirement age. Large Czech trade union demonstrations opposing austerity measures and fiscal and social reforms also took place in November 1997, June 1998, May 2009, May 2011 and April 2012 (Myant 2010; *MF Dnes*, 23 April 2012). In November 2005 Slovene trade unions organised peaceful mass demonstrations against proposed flat tax reforms and in 2011 they were instrumental in gathering sufficient signatures to trigger a referendum on pension reform laws and changes to the retirement age. They also organised a general strike of public sector workers in April 2012 (*Slovenian Times*, 18 April 2012).

⁴'Statut Českomoravské konfederace odborových svazů', available at: http://www.cmkos.cz/data/articles/down_2055.pdf, accessed 1 October 2010. Earlier drafts of the statutes include the same commitment.

Slovenije, SUS) in 1992 in anticipation of the negative social impacts of market reform on pensioners and older people. In 2008 SUS had an estimated 12,000 members, organised into nine regional organisations. This represents about 4% of ZSSS's total membership, a much lower proportion than in the Czech Republic or, indeed, in most other European states (Carley 2004). This is largely explained by the fact that members of industrial branch unions must choose to join SUS on retirement, rather than being automatically enrolled.⁵

Pensioner voice in trade unions

Such contrasting patterns of organisation translate into contrasting patterns of influence within the wider union movement. Despite formally representing almost one in five ČMKOS members, in practice the Czech Republic's ADO is a weak body. Czech trade unions' general practice of organising retired members in local level clubs linked to workplace branches means that ADO has no individual or collective membership. It also has minimal resources.⁶ Although the Association's statutes envisage a wide-ranging public role, including input into tripartite negotiations, it in fact plays a more limited role and functions largely as a source of advice and information to the ČMKOS leadership and as a coordinator of retired members across member unions, subordinating external lobbying to the Council of Seniors of the Czech Republic (*Rada seniorů České republiky*, RSČR) umbrella grouping (discussed below) of which it is also an affiliate.

The Association seems to have little or no direct input into ČMKOS's work in the Council of Economic and Social Agreement (RHSD), whose meetings ADO representatives do not attend even in a backroom capacity. The Association thus largely depends for influence on personal access to ČMKOS leaders and, to a lesser extent, on links to social democrat politicians with a background in the trade unions. While such access was reportedly good and provided a channel for influence, ADO's limited role and resources, its leaders felt, could sometimes lead ČMKOS to overlook pensioners when formulating its responses to policy proposals, a view echoed by polling conducted for ADO in 2003–2004 which showed widespread scepticism among pensioners towards the trade unions' role as defenders of their interests.⁷

Slovenia's SUS, by contrast, is a fully fledged member union of ZSSS and is represented accordingly at ZSSS congresses and in its governing bodies. It also enjoys greater institutional access to tripartite structures than its Czech counterpart: SUS leaders reported that they were able to represent their organisation's views and interests through involvement with the trade union delegation on Slovenia's Economic and Social Council (ESS). As with other individual unions, SUS leaders were on

⁵Interview with Konrad Breznik, President of SUS, and Miloš Mikolič, Secretary General of SUS, Ljubljana, 9 December 2008. Breznik estimated that about 10% of those leaving other unions through retirement chose to join SUS.

⁶ADO is based in a small suite of offices in ČMKOS's Prague headquarters, shared with the Council of Seniors of the Czech Republic; it has no permanent administrative staff. In 2008 its annual budget—allocated directly by ČMKOS—was 96,000 Czech crowns (approximately €3,800).

⁷Asociace důchodců odborářů, 'Průzkum o sociální situaci důchodců prosinec 2003–leden 2004', unpublished document in the author's possession.

occasion invited to join the wider ZSSS delegation and to participate in the formulation of its negotiating stance.⁸ However, the influence afforded by SUS's more independently constituted structure was arguably offset by its relatively small membership, which left it overshadowed both as a formal representative of pensioners and as a social force by Slovenia's extensively organised Federation of Pensioners' Associations of Slovenia (*Zveza društev upokojujencev Slovenije*, ZDUS) discussed below.⁹

Pensioners' associations

Territorially organised membership associations with elected leaderships are among the oldest and most enduring form of retired people's self-organisation in Western democracies (Pratt 1993). Pensioners' organisations of this type can be found in both the Czech Republic and in Slovenia and, perhaps surprisingly, have a depth of grassroots organisation and a degree of importance in interest representation, which generally exceeds those of trade-union sponsored pensioners' groupings.

The principal such association in the Czech Republic is the Union of Pensioners of the Czech Republic (*Svaz důchodců České republiky*, SDČR) formed in January 1990 as one of the first new interest groupings in post-communist Czechoslovakia. The Union's precise origins are unclear, as its founders are no longer alive and organisational records have been lost.¹⁰ However, its formation seems to have been prompted by fears over the possible social impact of the change of regime on retired and older people and it seems to have been loosely patterned on the type of official social organisation characteristic of the socialist period.¹¹ Originally a Prague-based initiative, the Union quickly developed branches in other localities and grew throughout the 1990s, in part by absorbing existing pensioners' clubs.¹² Although its membership declined from a peak of 30,000 in the mid-1990s, its current 93 local branches and 22,500 members, grouped into regional and sub-regional structures (Solich 2008), make the SDČR one of the larger individual membership organisations founded in the Czech Republic after 1989. It is the only Czech retired people's interest grouping with a nationwide grassroots organisation.

SDČR publications stress the voluntary and public spirited nature of its members' and officials' activism and emphasise the organisation's distinct status as a body run

⁸Interview with Konrad Breznik and Miloš Mikolič, Ljubljana, 9 December 2008.

⁹SUS was unrepresented on the boards of public corporations managing the health and welfare systems. In 2009 four of the five pensioner representatives on the Council of the Pensions and Social Insurance Institute (*Zavod za pokojninsko in invalidsko zavarovanje Slovenije*, ZPIZ) and all seven in the Assembly of the Health Institute (*Zavod za zdravstveno zavarovanje Slovenije*, ZZZS) were from ZDUS.

¹⁰A 70-member preparatory committee met in mid-January 1990 and the Union was formally registered at the end of that month, holding its first national congress in December 1990.

¹¹The Union of Pensioners of the Czech Republic (*Svaz důchodců České republiky*) is one of a handful of national civil society organisations founded after 1989 to use the title '*svaz*' ('union'), characteristic of communist-era social organisations.

¹²Interviews with Jan Solich, outgoing President of the Union of Pensioners of the Czech Republic, Hradec Králové, 13 November 2008 and Zdeněk Pernes, President of the Council of Seniors of the Czech Republic, Prague, 27 November 2008.

by pensioners for pensioners, sometimes referring to it as a self-organising 'pensioner community' (*důchodkový obec*) rather than simply an organisation. However, while this claim is not inaccurate, as with many Czech civil society organisations, the scope and autonomy of the Union are limited. With a membership of no more than 2% of Czech old age pensioners, the Union's claim to representativeness was limited and its grassroots base was sometimes overshadowed at the local level by the large elderly mass memberships of the Czech Republic's two biggest historic parties, the Communists (*Komunistická strana Čech a Moravy*, KSČM) and the Christian Democrats (*Křesťanská a demokratická unie–Československá strana lidová*, KDU–ČSL), which in 2005–2006 together comprised some 105,000 retired people (KSČM 2005, p. 54; Linek & Pecháček 2006, pp. 18, 32).

In contrast to ADO, the Union is heavily dependent on public funding, principally grants from the Czech Ministry of Labour and Social Affairs and, at the local level, from municipalities. The effectiveness of the Union as a national interest organisation was, paradoxically, further undermined by its locally-based grassroots character. Websites and local news reports suggest that—unusually for a Czech civil society organisation—the SDČR's local and regional groups were often better organised and more active than the Union's national leadership structures, which were extremely weakly resourced: in 2008, for example, the income of SDČR nationally was a mere 1.1 million crowns (approximately €45,000) of which 20% came from membership fees and 80% came from grants and state subsidies (Solich 2008). Local branches, combining interest representation with the provision of socio-cultural activities, often enjoyed relatively easy access to direct municipal funding reinforcing their autonomy and leading to wide variation in the nature of their activities, including relationships with political parties and local authorities. The Union's long-term inability to develop into a larger, more integrated national interest organisation contributed to the creation of the Council of Seniors of the Czech Republic umbrella grouping discussed below into which the Union, like ADO, largely subsumed national-level lobbying after 2005.

The principal independent pensioners' association in Slovenia is the Union of Pensioners' Associations of Slovenia (*Zveza društev upokoencev Slovenije*, ZDUS). Like the Czech SDČR, ZDUS is a national grassroots membership organisation, combining interest representation with educational and socio-cultural activities and delivery of social services. However, having existed as an official organisation under socialism, it is a mass organisation which operates on a markedly different scale from its Czech counterpart. Although membership has declined since the 1990s when it reached over 300,000 (ZDUS 2001, p. 38), at the end of 2007, the last year for which exact data are available, ZDUS had 472 local branches and 238,132 members (ZDUS 2008), making it the largest single civil society organisation in Slovenia with a membership comparable to the ZSSS trade-union federation (which has 300,000 members). Approximately 50% of retired people in Slovenia are members of ZDUS.

ZDUS has, moreover, retained property and resources accumulated during the communist period, principally the profitable Delfin hotel complex in Izola, the proceeds of which cover the running costs of the organisation's national headquarters (ZDUS 2009, pp. 4–5). However, despite the introduction in 2008 of an annual levy of

one euro per member to develop its central structures, ZDUS still requires external sources of income to sustain itself (ZDUS 2009, pp. 4–5). In 2008, for example, it received at least half its income of around €1 million from state and EU grants, with much of such external funding directed to support educational and welfare projects that ZDUS was contracted to deliver.¹³

Despite being a much longer established organisation than the Union of Pensioners of the Czech Republic, ZDUS has experienced very similar problems of organisational coordination: the federation's local associations had a high degree of *de facto* autonomy, resulting in widely varying concerns and capacities, making it sometimes difficult for ZDUS leaders to coordinate and mobilise their huge organisation behind cohesive national policies and priorities. ZDUS's status as an expansive but weakly led mass social organisation with an active grassroots also helps explain a peculiarity of Slovene politics: the existence of a small successful pensioners' interest party, the Democratic Party of Pensioners of Slovenia (*Demokratična stranka upokojencev Slovenije*, DeSUS), which has been represented in parliament since 1992 and is a regular participant in governing coalitions of left and right since 1998, (including the centre-right administration of Janez Janša formed in January 2012).¹⁴ DeSUS originally emerged as a local electoral grouping in February 1990 based on the Maribor branch of ZDUS, one of a number of such grassroots seniors' initiatives to develop during the political ferment of Slovenia's transition to democracy and independence in 1988–1991.

Umbrella bodies

In both states, the multiplicity of pensioners' and seniors' groups has led to the creation of umbrella bodies to coordinate their activities and to provide a stronger and more legitimate interlocutor for the state. This pattern has however, been particularly marked in the Czech Republic, where the fragmented and chaotic early development of new interest organisations representing vulnerable welfare state client groups—and uncertainties over their representativeness and legitimacy—led to the early formation in February 1991 of the Coordinating Committee of Organisations of Pensioners and Disabled People (*Koordinační výbor organizací důchodců a zdravotně postižených*, KVOD) of which the Union of Pensioners and (later) ADO were members. Although formally recognised for consultation as an interlocutor by the Ministries of Health and Labour, KVOD's effectiveness was limited by the looseness of its organisation and the diverging interests and views of its members. Such differences led to the departure of new Western-style NGOs, which viewed a focus on lobbying to maintain levels of state-administered welfare and pension benefits as too narrow, as well as the exit of

¹³In 2008 ZDUS received approximately €320,000 from Slovene government institutions such as the Pension Insurance Institute (ZPIZ) and the Ministry of Labour (MDDSZ); €293,000 was from EU funding and €130,000 in income came from the Hotel Delfin (interview with Bogdan Urbar, then General Secretary of ZDUS, Ljubljana, 10 December 2008).

¹⁴DeSUS was initially part of the United List of Social Democrats (*Združena lista socialnih demokratov*, ZLSD) created by Slovenia's reformed Communists. It first entered parliament independently in 1996.

many disabled people's organisations, which sought (successfully) to develop their own distinct interest group sector.¹⁵

The transformation of KVOD into an umbrella group for pensioners and seniors was, however, spurred only some years later by competition from the NGO sector and, indirectly, by the emergence of a distinct Czech public policy agenda relating to older people and population ageing. In 2002, to its leaders' considerable surprise, KVOD failed in a bid to win funding under the EU's PHARE programme from the Civil Society Development Fund (*Združena lista sociálních demokratů*, NROS) to coordinate the creation of new Seniors' Councils, envisaged by NROS as a forum on seniors' issues for civil society groups and healthcare professionals.¹⁶ Instead, a relatively small human rights NGO with roots in the dissident movement the Czech Helsinki Committee (*Český helsinský výbor*, ČHV) won the grant. Although the ČHV initiative was overtaken by the creation of the Czech government's advisory Council on Seniors and Population Ageing (discussed below), and the lack of long-term funding meant the projects had limited impact, the decision was seen by KVOD leaders as humiliating for their more broadly based organisation, prompting them in May 2005 to create the Council of Seniors of the Czech Republic (RSČR) as a more structured umbrella body focused on the needs of retired people which would be organised on recognisably 'European' lines.¹⁷

The RSČR proved considerably more successful than KVOD, steadily expanding from 12 member organisations in 2005 to 43 members in 2010 (*Rada seniorů České republiky 2009, 2010*), and claiming to represent some 320,000 'organised seniors' (*Rada seniorů České republiky 2010*, p. 2).¹⁸ The Council, however, centres around the two largest nationwide seniors' groupings affiliated to KVOD, the Union of Pensioners (SDČR) and ADO, with the bulk of other member organisations consisting of small locally or regionally based pensioners' groups or associations of retired members of trade unions and professional bodies outside the main ČMKOS federation. The leaders of SDČR and ADO, together with the Council's founder and president Zdeněk Pernes, have always played key leadership roles. The Council sees its role very strongly in terms of national interest representation and intermediation, regarding its legitimacy to represent the Czech Republic's 1.93 million old age pensioners as stemming not only from membership size, but also from its status as a 'united pensioners' movement'.¹⁹ Although a confederal body based on collective membership, the Council has thus focused considerable effort on creating its own structures distinct from those of member organisations, including regional branches, rather than being a loose alliance or forum as is commonly the case with 'seniors councils' in Western Europe (Evers & Wolf 1999).

¹⁵Interviews with Jan Solich, 13 November 2008, Zdeněk Pernes, 27 November 2008, and Jan Lorman, Director of Life '90 NGO, Prague, 20 November 2008.

¹⁶PHARE 2002—Podpora aktivního života seniorů', undated, available at: <http://www.nros.cz/cilove-skupiny/prijemci/seznamy-prijemcu>, accessed 1 November 2010.

¹⁷Interview with Zdeněk Pernes, Prague, 27 November 2008.

¹⁸As the Council's members typically lack detailed or accessible membership records, assessment of the precise numbers it represents is difficult.

¹⁹'O třetí generaci se Zdeňkem Pernesem', 21 May 2008, available at: <http://respekt.ihned.cz/rozhovory/c1-35753860-o-treti-generaci-se-zdenkem-pernesem>, accessed 1 November 2010.

However, partly in order to facilitate organisational development and access resources, the RSČR also plays a direct role as a grant-based service provider of help and support to older people, running telephone helplines and four professionally staffed regional advice centres. Such projects are financed by grants from the Ministry of Labour and Social Affairs and the Ministry of Local Development and from charitable donations from companies which make up the bulk of the Council's income. In 2009 RSČR had an annual income of just under four million Czech crowns (approximately €160,000), of which 2.9 million consisted of state subsidies, the bulk coming from the Ministry of Labour and Social Affairs (*Rada seniorů České republiky* 2010).²⁰ Such modest sums, which are roughly equivalent to levels of state funding received by a successful extra-parliamentary political party in the Czech Republic, are—allowing for differences in country size—a fraction of those annually available to Slovenia's ZDUS. Nevertheless they give the Council greater resources than its larger member organisations. The RSČR thus effectively functions as the sole national pensioners' interest organisation in the Czech Republic.

In Slovenia, by contrast, the dominant position and mass membership of ZDUS generated much weaker incentives to create umbrella structures. Although there is an equivalent body to the RSČR, the Coordinating Committee of Seniors' Organisations of Slovenia (*Koordinacijski odbor Seniorskih organizacij Slovenije*, KOSOS), it is a weak *ad hoc* body lacking any separate organisational existence of its own which has functioned only sporadically since its creation in 2005, acting mainly as a vehicle for cooperation between ZDUS and the Pensioners' Trade Union (*Sindikát upokojencev Slovenije*, SUS) and as an occasional platform for negotiations with government.

Strategies of influence

While the influence strategies of trade-union sponsored pensioners' groupings are to a large extent determined by their position within union structures, independent pensioners' organisations have a range of potential options. Although, when interviewed in 2008–2009 leaders of pensioners' associations allowed the possibility that they might organise independent grassroots mobilisation,²¹ the focus of both the Council of Seniors of the Czech Republic and Slovenia's ZDUS has largely been on 'direct' strategies of influence (Binderkrantz 2005): consulting with policy makers and lobbying to influence government programmes and legislation. In the Czech Republic the Council of Seniors makes use of the main formal institutional access points for interest groups: consultation with parliamentary committees (Kopecký 2001) and the longstanding practice (formalised in 2002) of ministries consulting designated stakeholders (*připomínkové místa*) on draft government legislation. Both the Union of Pensioners and the Council of Seniors of the Czech Republic (RSČR) have long been designated by the Ministries of Labour and Social Affairs and Health as such

²⁰The remainder of the Council's income is derived from sales of its monthly magazine *Doba seniorů*, which has a circulation of 6,000–10,000. Membership fees typically account for around 1% of annual income (*Rada seniorů České republiky* 2007, 2010).

²¹Interview with Zdeněk Pernes, Prague, 27 November 2008 and telephone interview with Mateja Kožuh Novak, President of ZDUS, 19 February 2009.

stakeholder and regularly make formal responses to proposed legislation, focusing on laws on social benefits and pensions (particularly their annual uprating), healthcare and housing. They are also regularly invited to parliamentary committees on health and social affairs.

However, while well-established and formally open, the Czech consultation system has a high level of official discretion; as with many *připomínkové místo* groups in civil society (Kunc 2006), the Czech RSČR appeared to be consulted at a relatively late stage, with their submissions typically confined to brief, highly specific responses to draft legislation. This, however also reflected the organisation's limited resources and the limitations of the public subsidy it receives, which is earmarked for the delivery of advice and support services to older people, rather than legislative monitoring or policy research: while the RSČR reportedly had small expert teams of qualified volunteers to analyse proposed legislation numbering some 25 people,²² it clearly lacked the capacity for broader, sustained research. Indeed, as with other Czech interest organisations (Kunc 2006), the consultation process thus appears to serve more as a source of information than as a channel for influence.

In contrast to the Czech Republic, Slovenia historically lacked a procedure for pre-legislative consultation: only in January 2009 in response to pressure from ZDUS did Slovenia's Labour, Family and Social Affairs Ministry create four *ad hoc* joint consultation committees allowing seniors' organisations to comment on draft legislation affecting them, although more general consultation standards were passed later in the same year.²³ This was to some extent compensated for by the greater openness of Slovene parliamentary committees to interest groups, including pensioners' organisations (Fink-Hafner & Krašovec 2005). However, one unusual feature of Slovenia's legislative and parliamentary system normally empowering interest organisations—the fact that the upper chamber of parliament, the National Council (*Državni svet*), represents functional and territorial interests (Fink-Hafner 1998)—was closed to ZDUS: National Council representatives are nominated only by professional and producer groups and local government, excluding groups defined by age or welfare status. Interestingly, despite being a far larger, better resourced organisation, like the Czech RSČR, Slovenia's ZDUS also seems to have been impeded in playing an effective role in the legislative process by inadequate structures for tracking and engaging with policy making and law making. Notwithstanding its huge mass membership, for many years the organisation lacked a professionalised national headquarters, only establishing a structure of policy-oriented commissions capable of shadowing government ministries' legislative work in 2008 following leadership change.²⁴

²²Interview with Zdeňěk Pernes, Prague, 27 November 2008.

²³'Dogovor med Ministrstvom za delo, družino in socialne zadeve in Zvezo društev upokojujencu Slovenije', 16 February 2009, available at: http://www.mddsz.gov.si/fileadmin/mddsz.gov.si/pageuploads/dokumenti_pdf/mddsz_zdus_dogovor.pdf, accessed 1 February 2011; and 'Resolution on Legislative Resolution', available at: www.mju.gov.si/.../RESOLUCIJA_zadnja_verzija_ENG_19nov09.doc, accessed 1 February 2010.

²⁴Telephone interview with Mateja Kožuh Novak, 19 February 2009.

Interest group-party relations

For interest groups in both states political parties play a key role as gatekeepers to political power and the legislative process (Fink-Hafner 2006; Kopecký 2006). Pensioners' interest organisations in both states have thus sought, broadly successfully, to maintain regular contacts with parties and party politicians, reporting regular bi-lateral meetings with politicians in elected office of both left and right, often initiated at the interest groups' request (Rada seniorů České republiky 2007, 2010; ZDUS 2008, 2009, 2010). Both ZDUS and the RSČR (and its affiliates) emphasise that they are non-partisan organisations open to all seniors and are careful to avoid acts of overt partisanship, formally recommending, for example, at election times only that their members should vote but not making explicit endorsements. However, in both the Czech Republic and Slovenia at the time this research was conducted, pensioners' interest organisations had much closer and better developed, if ambiguous, relationships with parties of the left and centre-left: the Slovene Social Democrats (*Socialni demokrati*, SD) and Liberal Democracy of Slovenia (*Liberalna demokracija Slovenije*, LDS)²⁵ and, in the Czech Republic, the Czech Social Democrats (ČSSD) and the Communist Party of Bohemia and Moravia (KSČM).

Such affinities reflect overlapping commitments to a relatively expansive welfare state, the political and career background of interest group leaders,²⁶ and, in some instances, the greater concern of left-wing parties to work with pensioners' interest groups and organised interests generally. In the Czech Republic, Social Democrat and Communist politicians are thus frequent interviewees in publications of the Council of Seniors (RSČR) and regularly attend congresses of RSČR and its affiliates, while individual social democrat and communist deputies with whom the RSČR has developed contacts have sometimes acted as an additional channel of influence by presenting legislative amendments drawn up by the Council to parliament. In 2010 the Union of Pensioners of the Czech Republic (SDČR) went one step further by signing formal cooperation agreements with three left-wing parties: the Social Democrats, the Communists and the non-parliamentary populist grouping, Sovereignty (*Suverenita*).²⁷

In Slovenia, the greater difficulty of legislative amendment by individual deputies, the greater bargaining weight afforded by its mass membership and the more fragmented nature of the centre-left have led ZDUS to focus more on influencing government programmes and coalition making. In December 2008, for example, a ZDUS-led delegation presented a memorandum of demands to the newly formed centre-left administration of Borut Pahor, which seemingly resulted in the inclusion of a commitment to create a new Office for Older People in the new government's

²⁵LDS dropped out of the Slovene parliament in the December 2011 elections.

²⁶Mateja Kožuh Novak, the President of Slovenia's ZDUS, for example, served as a parliamentary deputy for the post-communist Social Democrats in 1992–1996, while Zdeněk Pernes, chair of the Czech RSČR, is a former member of the Communist Party of Bohemia and Moravia and was elected to Prague city council on the party's list in 1998.

²⁷'Komunisté budou spolupracovat se Svazem důchodců', *Parlamentní listy*, 15 July 2010, available at: <http://www.parlamentnilisty.cz/kraje/ustecky/170266.aspx>, accessed 1 December 2010. Centrist and centre-right parties were also reportedly approached but rebuffed or ignored the offer.

programme.²⁸ Similarly, in January 2012 following indecisive parliamentary elections, ZDUS's leaders pressed deputies in centre-left parties (unsuccessfully) to support the prime ministerial candidacy of Zoran Jankovič, whose new left-liberal Positive Slovenia (*Lista Zorana Jankoviča–Pozitivna Slovenija*, LZJ–PS) grouping had emerged as the largest party (STA 2012).

Interestingly, ZDUS's relationship with the Democratic Party of Pensioners of Slovenia (DeSUS) has generally been a detached one, with strong elements of rivalry. Despite brief periods of cooperation, as in 2010 over shared opposition to pension reform proposals, ZDUS—which later accepted a revised version of the proposals—became highly critical of the DeSUS, attacking the party for withdrawing from the (2008–2011) centre-left Pahor government as well as its later willingness in January 2012 to join a centre-right administration, claiming that the party was unrepresentative and opportunistic.²⁹ Such tension between pensioners' interest groups and pensioners' parties, when they have emerged, is common, given overlapping claims to represent the same constituency (Hanley 2011).

New agendas, new opportunities?

Pensioners' interest organisations in both states appear to have gained an additional channel for contact and consultation through official reframing of population ageing as a distinct new policy challenge requiring distinct new responses and the creation of new consultative *cum* representative institutions. Although linked to a growing international movement for pension reform (Orenstein 2008b), such new policy agendas saw population ageing as a broader challenge with ramifications stretching across health and social care; education and civil society development, requiring a coordinated response to foster intergenerational solidarity and non-discrimination; promote the dignity and autonomy of older people; and enhance older people's participation in society and the economy. In Central and Eastern Europe such new agendas emerged partly through European and international contexts and partly through the influence of domestic NGOs.

Despite an imperfect legal framework, Slovenia and the Czech Republic both saw rapid growth in the NGO sector, including age-related 'pro-senior' NGOs (Green 1999; Havlič *et al.* 2001). The origins, agendas and organisational forms of such NGOs offered a distinct alternative to those of pensioners' interest groups and, to some extent, a rival model. The largest pro-senior NGO across the two cases, Life '90 (*Život '90*) in the Czech Republic, for example, was formed in 1990 by middle-aged social activists with backgrounds in the arts, drawing inspiration from foreign models such as Abbé Pierre's Emmanuel community and Austrian seniors' initiatives. Accordingly,

²⁸The breakdown of social dialogue in 2009–2010 following the imposition of austerity measures saw the Pahor government back out of this commitment ('Pahor: Urada za starejše ne bo', 19 April 2010, available at: <http://zlataleta.com/urad-za-starejse/>, accessed 11 March 2011).

²⁹In 2011 DeSUS polled 76,853 votes (6.97%) and had a stated membership of 13,690. Analysts generally agree that, as a pivotal party, DeSUS had a narrow but real leverage over aspects of pension and social policy (Guardiancich 2012). However, the 2008–2012 Minister of Labour and Social Affairs, Ivan Svetlik, a DeSUS nominee, was an independent technocrat and the party exercised no real control over the Ministry itself.

its vision stressed the gradual re-locating of social and care services for older people in communities and civil society, rather than in the state (Život '90 2001, p. 5). After a spell of voluntary activism, the group quickly professionalised into a Western-style advocacy and service NGO without members, which was administered 'like an enterprise' by its founders, with employees or volunteers having a contractual relationship with the organisation.³⁰ However, unlike pensioners' interest organisations, despite higher levels of funding, Life '90 eschewed the development of a nationwide organisation, seeking instead to be a catalyst for change in public policy and public opinion through its projects and media work.

However, the main impetus for change came from Central and Eastern European states' 'downloading' of policy agendas stemming from external commitments such as the EU's Open Method of Coordination Social Protection *acquis* and the 2002 UN International Plan of Action on Ageing (United Nations 2002; European Commission 2005). Such commitments led states across Central and Eastern Europe, including the Czech Republic and Slovenia, to adopt coordinated, multi-agency population-ageing strategies.

New modes of consultation

As is characteristic of newly defined policy fields (Meyer & Imig 1993, p. 258), such programmes led to the opening up of new political space for interest organisations: in both states policy makers quickly gave way to objections from pensioners' organisations that, while the programmes spoke of engagement and partnership with civil society, they had been formulated in a technocratic fashion by officials and contained no concrete provision for participation by civil society groups. This led directly to the creation of new consultative councils on ageing in which pensioners' groups were represented.

The Czech Republic adopted its first five-year National Programme of Preparation for Ageing in 2003, and following a positive response to demands from pensioners' organisations, Zdeněk Škromach, then Social Democrat Minister of Labour and Social Affairs, created the Government Council for Seniors and Population Ageing (*Rada vlády pro seniory a stárnutí populace*, RVSSP) in 2005. The Council's mission was initially defined as one of promoting active ageing and the engagement of older people and evaluating the 2003–2007 National Programme of Preparation for Ageing, but it was later extended to become a vehicle for strategic partnership between government and civil society enabling 'the participation of older people in decision-making on issues that significantly affect their lives' (Ministerstvo práce a sociálních věcí 2008, p. 51).

The RVSSP, which usually meets three times a year, is composed of 28 members. Of these, 12 are from central government—including the minister and deputy minister (*náměstek*) of the Ministry of Labour and Social Affairs (who chair the Council); deputy ministers from six other government departments; and representatives of the two parliamentary committees on social affairs. There were additionally four representatives of seniors' organisations—of which three were from the RSCR and

³⁰Interview with Jan Lorman, Prague, 20 November 2008.

its affiliates—and two representatives from old-age oriented NGOs, with the remaining members drawn from professional and civil society groups including employers, trade unions, regional and local government, health insurance companies and the medical profession.

In 2006 Slovenia adopted the Strategy for Care of Older People Until 2010 (Ministry of Labour, Family and Social Affairs 2008) and in the autumn created the Council for Solidarity in the Co-existence of Generations and Quality of Population Ageing (*Svet za solidarno sožitje generacij in za kakovostno staranje prebivalstva*), an advisory body for population ageing and seniors' issues similar to that already established in the Czech Republic. As in the Czech Republic its formation stemmed partly from pressure from the ZDUS pensioners' union and objections that the Strategy had been prepared by ministerial experts with little input from outside organisations or representatives of older people (Helpage International 2007). Although governmental advisory bodies are uncommon in Slovenia and their status less formalised than in the Czech Republic, the Council was similar in composition and status to that of the Czech RVSSP, having been formed under the auspices of the Ministry of Labour to coordinate and monitor ministries' implementation of the Strategy of Care. The 24-member Council meets five or six times a year and, as in the Czech Republic, brings together representatives of ministries, pensioners' organisations and NGOs, service providers and gerontologists, with membership evenly divided between central government and non-governmental bodies.³¹ However, while the government side on the Czech RVSSP is represented by elected politicians at ministerial or deputy ministerial level and senior civil servants, the government side on Slovenia's Council for Solidarity is represented only by mid-ranking officials below the level of ministerial directorate head.

The creation of advisory bodies to address the growing importance of retired people as a social group, institutionalising their representation, was a potentially important innovation. However, for a number of reasons the scope of consultation they opened up to pensioners' interest organisations in both states appears to have been a limited extension to traditional practices. In both states such bodies were poorly resourced and lacked both a formal role in the legislative process or any influence in policy formulation and were largely confined to oversight and scrutiny. In the Czech Republic, for example, the second (2008–2012) National Programme of Preparation for Ageing was initially wholly drafted by an inter-ministerial experts' group and then submitted to the Council for comment.³² Both bodies also lacked budgets or administrative resources of their own leaving them reliant on information supplied by other agencies, and they were often hampered by poor or patchy coordination between ministries.

Close comparison of the two cases, however, highlights important differences in the underlying relationships between state and social actors in the two bodies. Although both Councils were organised around norms of consensus, the influence of pensioners' organisations within them varied. In the case of the Czech Government Council for

³¹Interview with Davor Dominkuš, Head of Social Affairs Directorate of the Slovene Ministry of Labour, Family and Social Affairs and mid-level ministerial officials, Ljubljana, 18 February 2009.

³²'Jednačí řád Rady vlády pro seniory a stárnutí populace', available at: <http://www.mpsv.cz/cs/2859>, accessed 1 November 2010.

Seniors and Population Ageing, the Labour Ministry's ability to set its agenda,³³ led its discussions to be often heavily focused on social services and healthcare issues, paying less attention to the principal concerns of seniors' organisations grouped in the RSČR: pensions and living standards. Requests by pensioners' representatives that the Council discuss issues such as the 2005 'Bezděk Report' on options for pension reforms were thus rejected on the grounds that pensions were an issue affecting the whole of society and would thus be more appropriately discussed by political parties.³⁴ In Slovenia ZDUS had greater influence on representation in the Council for Solidarity and Co-existence of Generations whose proceedings it chaired. However, this was offset by the fact that, in contrast to the Czech RSVVP, it was attended on the government side by only middle-ranking officials, leaving ZDUS representatives dissatisfied with the level of influence and access afforded.³⁵

Assessing and explaining patterns of interest group development

Although they parallel familiar organisational forms found in Western Europe, the retired people's interest organisations that have developed in the Czech Republic and Slovenia call for some degree of reassessment of earlier assumptions. Despite their generally assumed weakness, in both cases pensioners' interest organisations emerge as quite sizeable membership organisations with significant elements of local grassroots organisation. Czech pensioners' organisations grouped in the Council of Seniors organise some 17% of pensioners, a figure which, even allowing for a degree of overestimation, compares favourably with the density of Czech trade-union membership among employees, which Myant (2010, p. 7) estimates as being as low as 10%. Moreover, Slovenia's ZDUS, which organises approximately 50% of the country's pensioners, has an organisational density rivalling the largest national seniors' associations in Western Europe (in Sweden and Austria) (Evers & Wolf 1999; Feltenius 2007).

In both cases such grassroots structures were maintained through the provision of local level socio-cultural facilities to members as 'selective incentives' combined with otherwise low demands, both financially and in terms of participation, and through significant external funding from state and European bodies for the delivery of welfare and socio-cultural programmes, which were instrumentalised by interest group leaders to maintain and develop their organisations. Despite this, given the range of collective action problems noted by Vanhuyse (2008), the formation and emergence of such relatively large organisations is still puzzling. Moreover, somewhat contrary to expectations, in both cases independent pensioners' associations represent a more significant force in terms of membership, resources and, arguably, political influence than trade-union sponsored pensioners' groupings. Finally, given their greater than

³³Jednací řád Rady vlády pro seniory a stárnutí populace', available at: <http://www.mpsv.cz/cs/2859>, accessed 1 November 2010.

³⁴Záznam z 11. zasedání Rady', 4 December 2009, available at: <http://www.mpsv.cz/cs/8621>, accessed 20 November 2010 and 'Záznam z 12. zasedání Rady', 28 April 2010, available at: <http://www.mpsv.cz/cs/8923>, accessed 20 November 2010.

³⁵Interviews with officials in the Slovene Ministry of Labour, Ljubljana, 18 February 2009 and telephone interview with Mateja Kožuh Novak, 19 February 2009.

anticipated organisational capacities, the choice of 'direct' strategies of lobbying, contact and consultation by pensioners' interest organisations in both states may also need re-examination.

Regime legacies

Contrary to blanket assumptions about Central and Eastern European pensioners' lack of pre-existing organisation and capacity (Vanhyusse 2008, p. 13), the Czech and Slovene cases clearly highlight the importance of legacies from outgoing communist regimes relevant to their development as organised interests. In the first instance straightforward organisational inheritances—the ability to draw upon, recoup and re-organise pre-existing structures—seem highly relevant to the development of viable pensioners' interest organisations in both cases, albeit to different degrees. In Slovenia this is clearly visible in ZDUS's status as the direct successor to an official communist-era mass social organisation, having been formed in 1945–1946 as a welfare organisation to cope with post-war austerity. ZDUS—alongside national equivalents in other republics—was quickly integrated into the Yugoslav communist regime's institutional structures, operating (with varying degrees of autonomy) as part of the official trade-union federation before finally becoming a separate body in the 1960s (ZDUS 2001, pp. 31–32).

In communist Czechoslovakia, by contrast, although as in other Soviet-type regimes a range of social groups were formally represented through mass organisations, there were no official organisations representing pensioners or older citizens. Instead older and retired people were organised at a purely local level in social clubs or associations of retired former colleagues run by local authorities and state enterprises. This absence of an official communist-era organisation for older people explains why Czech pensioners' organisations have failed to match the membership density of ZDUS. At the same time, however, the relative success of the Czech Union of Pensioners (SDČR) in early organisation-building compared to other post-1989 membership organisations suggests it benefited from an ability to incorporate pre-existing local clubs and groups.³⁶

Czech–Slovene comparison also suggests that communist regime type may matter for the durability of communist-era social organisations. Slovenia, as a constituent part of Tito's model of Yugoslav 'self-managed' socialism, developed a complex, decentralised web of overlapping socio-political institutions (Cohen 1989). In the case of ZDUS, as 'self-managed socialism' was implemented across Yugoslavia from the 1950s, both the Union itself and the local pensioners' associations that formed its basic units became more autonomous (ZDUS 2001, pp. 9–38), a trend which accelerated after 1974 when Yugoslavia's new constitution and associated legal reform gave explicit recognition to 'self-managing interest groups' (Havlič *et al.* 2001; ZDUS 2001, pp. 31–32). While its relatively decentralised autonomous grassroots later made ZDUS an unwieldy organisation, it also arguably generated legitimacy and embeddedness that contributed to ZDUS's survival as a mass organisation after the fall of communism.

³⁶Interview with Jan Solich, Hradec Králové, 13 November 2008.

In Czechoslovakia after 1968, the regime reverted to a rigid ‘bureaucratic authoritarian’ form of communism (Kitschelt *et al.* 1999). Accordingly, official mass organisations in communist Czechoslovakia were highly centralised, bureaucratic shells with formalistic membership and participation, lacking elements of grassroots engagement and legitimacy, which typically led to the collapse of mass membership organisations after the fall of communism. The Czech Union of Women (*Český svaz žen*, ČSŽ), for example, had an estimated membership of half a million in 1989, which plummeted to 40,000 by the mid-1990s (Havelková 2008), declining to 18,000 by 2009.³⁷ Even if an official mass seniors’ organisation had existed, given the nature of Czechoslovakia’s regime it might therefore have suffered similar contraction, rather than the smooth continuity achieved by ZDUS.

Despite a broad literature on the legacies of communist rule for the development of civil society organisations in Central and Eastern Europe generally (Howard 2003; Pérez-Solórzano Borrágán 2006)—including more focused work on Central and East European trade unions (Crowley 2004; Ost 2009)—there is seemingly little research on the impact of national forms of communism on the subsequent configuration of particular interest group sectors. The patterns highlighted above are, however, broadly in accordance with the findings of Grzymała-Busse (2001, 2002) in her work on former ruling communist parties. Grzymała-Busse found that outgoing communist regimes’ varying levels of internal pluralism and openness to society affected subsequent patterns of national organisational development.

However, this research suggests that such regime legacies may work differently for social organisations; while for communist successor parties, regime pluralism and openness facilitated the dismantling of mass memberships, for a social organisation like ZDUS they may have promoted its preservation as a mass membership organisation. However, it seems difficult to draw any straightforward causal connection between communist regime type and the existence (or non-existence) of official mass organisations for older people: East Germany for example, possessed a ‘bureaucratic-authoritarian’ regime but accommodated the *Volkssolidarität*, a national organisation providing voluntary self-help and social services to older people (Chamberlayne 1995). Moreover, while ZDUS’s position in the ‘self-managed’ system of the Slovene Socialist Republic may have facilitated organisational continuity, in other ways it left it ill-equipped to operate in the more pluralised political and policy-making environment that emerged with democratisation. Unlike official mass social organisations of youth and women, ZDUS was not formally represented in the communist-era Socialist Alliance of Working People of Slovenia (*Socialistična zveza delovnega ljudstva Slovenije*, SZDLS) which offered representation and a degree of influence in the multi-tiered, multi-cameral legislative structures characteristic of Yugoslav socialism, relegating it to a largely socio-cultural role. While individual ZDUS officials sometimes gained political office at the local level,³⁸ at the national level its leaders did not develop the ‘portable skills’ of negotiation and coalition-making usually associated with *nomenklatura* elites in liberal communist regimes

³⁷‘O Českém svazu žen’, undated, available at: <http://www.csz.cz/view.php?cisloclanku=20081004>, accessed 1 March 2012.

³⁸Interview with Bogdan Urbar, Ljubljana, 10 December 2008.

(Grzymała-Busse 2001, 2002), resulting in ZDUS's subsequently slow process of organisational learning, adaptation and modernisation.

Patterns of transition and the regime-based divisions

In both states it also appears that the transition from communism, and the politically fluid period that immediately followed, was a critical juncture for the development of pensioners' interest organisations. Firstly, notwithstanding the existence of 'strategic social policy' intended to insulate retired voters from the harshest consequences of transition (Vanhuysse 2006a, 2006b), early uncertainty over the impacts of market reforms on older people acted as a crucial impetus to the formation of pensioners' organisations, allowing collective action problems to be overcome as well as spurring trade unions into creating their own pensioners' groupings.

Contrasting regime types, however, also conditioned contrasting patterns of transition from communism, which can further explain variation between the Czech and Slovene cases. By the late 1980s Slovenia had developed a liberal reformist communist regime of 'national accommodation' which presided over—and sought to manage—growing social and political pluralism, ultimately working with opposition forces to achieve national independence and a transition to multi-party democracy in 1990–1991 (Bebler 2002). This smooth and consensual transition—and the institutional choices associated with it—facilitated a consensual pattern of party politics in the 1990s centring on moderate parties of the left with roots in the former ruling party and reformist *nomenklatura* (Guardiancich 2012). Such a climate not only allowed ZDUS, like other former official mass organisations, to emerge with resources intact, but reduced potential conflict with both government policy makers and activists seeking to develop Western-style NGOs working with older people. ZDUS was structured as a traditional mass interest organisation, strongly oriented towards pensions and social citizenship and it was sometimes critical of new agendas on ageing, as over-medicalised and too focused on vulnerable sub-groups (Helpage International 2007). However, although occasionally awkward in its relationships with NGOs,³⁹ its dominant and well-established position made it an inevitable but acceptable partner for both government and the NGO sector. Correspondingly, without seeking to emulate them wholesale, ZDUS's leaders sought to learn from NGOs, including European NGO alliances such as AGE Platform (which it joined in 2008), as a means to modernise and professionalise its lobbying and communications.⁴⁰

In contrast, the rapid collapse of the Czechoslovakian regime in November–December 1989's 'Velvet Revolution' saw the overnight introduction of pluralism in the context of unreformed socialist-era institutions and practices. The sudden and polarising nature of the Czech transition led to a sharp and contentious demarcation of 'communist' organisational and political forms and new, 'democratic' alternatives derived from the West or from the thinking of the dissident opposition. As well as generating a polarising effect in politics, such a 'regime divide', as Grzymała-Busse

³⁹See for example 'Diversity is the Treasure of Society—Final Activity Report', available at: <http://ec.europa.eu/social/BlobServlet?docId=2083&langId=en>, accessed 1 February 2011.

⁴⁰Telephone interview with Mateja Kožuh Novak, 19 February 2009.

(2001) terms it, also bisected the emerging older people's interest sector, generating a very sharp divide between the NGO model typified by Life '90 and that of organisations in the Council of Seniors of the Czech Republic.⁴¹ This was paralleled by a sharp ideological and policy divide in understandings of the needs and interests of retired and older people: while Life '90 focused, broadly in line with European agendas, on the empowerment, autonomy, inclusion and rights of older people, the groups in the RSČR were more concerned with levels of state welfare, health and pension provision, seeing NGO preoccupations as secondary issues, and expressing scepticism about the relevance of EU agendas for a post-communist country such as the Czech Republic. Although there is limited cooperation, relations between Life '90 and the Council of Seniors are distant, with each quietly critical of the other's agendas and strategies, and aware that they reflect underlying political differences.⁴² This divide can also be seen in a similar wariness towards Czech pensioners' interest organisations on the part of Labour Ministry officials, which contrasts markedly with the generally positive attitudes expressed towards ZDUS by Slovene officials.

Trade unions and pensioners' organisations

In both the Czech Republic and Slovenia there is a close relationship between pensioners' organisations and trade unions: in addition to the existence of trade-union sponsored pensioners' groupings, independent pensioners' interest organisations in both states have been closely aligned with the main trade-union federation, and they share its ambiguous political position of combining formal non-alignment with informal links with parties of the left (Avdagic 2004). Despite their size and the resources of their sponsors, trade-union based seniors' groupings in both states play a surprisingly secondary role in organising pensioners as an interest constituency. In Slovenia this is in part explicable by the large pre-existing structure of ZDUS. However, it is also evident in the Czech Republic where national pensioners' associations were organisationally much weaker, and where in formal terms, the trade-union backed ADO was a very large organisation.

Although Czech and Slovene trade unions seem to have been initially slow to recognise the potential importance of pensioners as a constituency, such attitudes seem to lie in trade unions' difficulties in reconciling the representation of a growing retired population with their core role of representing (declining) numbers of employee members, whose interests and priorities may diverge and, potentially, even conflict with those of current pensioners. While it is perhaps an exaggeration to suggest in these two cases that 'the elderly were among very first constituencies to be shaken off the radar of union elites' (Vanhuysse 2008, p. 21), it is striking that the (very different) institutional vehicles created for the representation of their retired members by the principal trade-union federations in each state have the effect of limiting the

⁴¹Havelková (2008) notes similar tensions between the Czech Union of Women (ČSŽ), a former official mass organisation, and newer feminist NGOs.

⁴²Life '90's director Jan Lorman acknowledged that its stress on non-state provision put it 'more towards the right' (interview, Prague, 20 November 2008).

pensioners' voice within the wider movement, either through the absence of national representative structures (as in the Czech Republic) or by the requirement for re-registration in a separate organisation (in Slovenia). While the two cases provide limited evidence of political divergence between organised labour and pensioners' groups, given broadly shared views on social and economic policy, tensions are identifiable, especially in relation to issues of intergenerational justice. In Slovenia for example, having accepted revised pension reform laws, ZDUS did not join trade unions in campaigning for a referendum to nullify them and recommended that its members vote for the reforms (Kristan 2011; Kožuh Novak 2011).⁴³ Such findings suggest that, notwithstanding the post-communist context, relationships between retired and employed workers with trade unions are broadly consistent with patterns found in Western Europe (Anderson & Lynch 2007)

Strategies

As anticipated by Vanhuysse (2006a, 2008), mobilisation strategies played a very limited role in the repertoire of pensioners' interest organisations. This, however, cannot wholly be explained by the collective action problems he discusses were solved on a sufficient scale to create and maintain relatively large membership organisations. Interviewed in 2008 and 2009, interest group leaders in both states were confident that they could organise protests,⁴⁴ and an organisation such as Slovenia's ZDUS clearly has ample ability to mobilise members *en masse*, having organised large regional festivals and successful one-off national initiatives such as the 2010 petition campaign to replace the management of the Vzajemna health insurance cooperative, of which many pensioners were members (Zupanič 2010).

As interest group leaders themselves suggested, the orientation towards direct strategies of lobbying and engagement with policy makers and legislators thus seems to represent a deliberate strategic choice reflecting the greater perceived long-term efficacy of directly seeking to influence political and legislative outcomes. This is consistent with broader patterns among interest groups, which represent a well-defined sectional constituency and focus on a limited number of policy areas (Binderkrantz 2005).⁴⁵

However, while there is no automatic or exclusive correspondence between organisational forms and strategies of influence deployed (Binderkrantz 2005), there has arguably been a mismatch between Central and Eastern European pensioners' organisations' grassroots membership structures, low levels of professionalisation and limited concentration of resources at national level, characteristic of pensioners' organisations in both states, and the requirements of effective legislative monitoring and lobbying. Among organisations seeking to engage with and influence policy makers in both Central and Eastern Europe and elsewhere, there has been a

⁴³The referendum held in June 2011 overwhelmingly rejected the reformed pension system.

⁴⁴Interviews with Jiří Pernes, Prague, 27 November 2008 and Mateja Kožuh Novak, 19 February 2009 (telephone interview).

⁴⁵Interviews with Jiří Pernes, Prague, 27 November 2008 and Mateja Kožuh Novak, 19 February 2009 (telephone interview).

discernable trend away from participatory structures (Tarrow & Petrova 2007, p. 15; Skocpol 2003). This pattern of organisational mismatch among pensioners' organisations—and the slow pace of their organisational modernisation—contrasts markedly with the development of an NGO like Life '90, which made a rapid transition from volunteer activism to professionalism without nationwide grassroots structures, which closely fitted its dual strategy of engaging with policy makers and influencing public opinion through the media. The mismatch between pensioners' interest organisations' chosen structures and chosen strategies seems path-dependent, carrying over from an earlier model of mass social organisation as a means of establishing legitimacy and representativeness—and hence claiming access to policy makers.

Conclusions

Despite the widely perceived weakness of pensioners as an organised social group, the Czech and Slovene cases highlight that sizeable membership-based pensioners' interest organisations integrated into national interest representation systems can emerge in Central and Eastern Europe—and that they can do so independently of trade unions. Relative success in organisation building and maintenance was, however, combined with resource weakness characteristic of many non-producer civil society groups in the region: even under the 'best case' conditions of Slovenia, ZDUS's extraordinarily high organisational density still left a significant dependence on external funding.

The emergence, somewhat against expectations, of viable and broad, but resource-poor, pensioners' interest organisations was shaped by a mixture of impulses, some previously little known: the survival of forms of social organisation for older and retired people developed under communism; the galvanising effect of early fears over the social impact of transition; post-communist governments' need for interlocutors to legitimise and inform their policies; and the diffusion of new paradigms of population ageing as new policy sectors requiring stakeholder consultation and participation.

In comparative terms, the two cases suggest that the nature of the outgoing communist regime and the nature of transition are of particular importance in laying down distinct legacies, which affected both the availability of organisational resources to emerging pensioners' interest organisations and, more indirectly, their relationship with NGOs and policy makers. Future research would, however, need to theorise such legacies more widely and systematically, taking into account the distinct legacies of patronage-based communist regimes (Kitschelt *et al.* 1999) and the diverse structure of social and welfare organisations under communist regimes, which may not be reducible to existing typologies of communist regimes.

Cross-national variations in formal institutional opportunities, by contrast, seem from the Czech–Slovene comparison to have been of more limited relevance. The greater openness of the Slovene political system to the representation of social interests seem to have been offset by a traditional conceptualisation of corporate socio-economic interests, which excluded even a broad organisation such as ZDUS from the National Council and Social and Economic Council. Consultation structures created to give civil society groups a voice in new population ageing strategies, the two cases suggest, have so far had limited impact as these have been *ad hoc* bodies lacking real

power with sometimes restricted agendas, excluding high-profile issues like pension reform, which political parties, officials and traditional social partners have reserved to themselves. Wider comparative research on the configuration of pensioners' interest organisations in Central and Eastern Europe would, however, have to allow for the greater institutional instability of party systems and, in particular, the greater fluidity of left parties in some Central and Eastern European democracies.

Despite lacking appropriate resources or concentrations of expertise, in the period reviewed pensioners' interest organisations in both cases opted to focus heavily on strategies of elite-level engagement with legislators and policy makers. Their retention of broad membership structures, however, suggests a greater than assumed mobilisation capacity, suggesting that, like economic interest groups such as trade unions—and perhaps in coordination with them—they could also deploy protest strategies if social dialogue and consultation mechanisms are eroded by the politics of austerity.

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