

Concepts of Religion and the State: An Application to South-Eastern Europe

Jochen Töpfer

This chapter provides an overview of theoretical concepts between church and state, and examines the divergent cases of Slovenia and Macedonia. Slovenia and Macedonia, as relatively small countries of Eastern Europe, represent examples of constantly changing relationships between religious communities, the state, and the population since the initial post-socialist transition two decades ago. A common feature of social change is that religious communities are in search of their role within society and politics. Developments in Slovenia offer insights into the dynamics of the cleavage between traditional religions and new movements of indifference towards religious feelings. In Macedonia, the population is represented by two traditional religions (Christian Orthodoxy and Sunni Islam) that are interrelated with ethnic identity. Thus, following major political intervention, religion became a strong source of identity.

Introduction: Religion and State in South-Eastern Europe

Analyzing the relationships between religion, state, and society in Eastern Europe from the perspective of sociology means to enter areas of expertise of theology, cultural studies, history, anthropology, political science and even economics (see Segal 2006:vii). Researchers dealing with the topic should be aware of the academic context in order to facilitate and encourage open discussion among the scientific disciplines. Nevertheless, all share that most attention is focused on circumstances within the dominant societies of the region, such as the Russian Federation or Poland. In contrast, this chapter is concerned with the two cases of Slovenia and Macedonia. In these relatively small societies, religious communities reemerged as actors in the civic and political spheres after 1991. Therefore, they provide two useful cases for sociological analysis.

In Slovenia, a traditional religious community, the Roman Catholic Church (RKC¹), is challenged in the public and political arenas by personal indifference to

1 RKC—Katoliška Cerkev v Sloveniji.

religion, and even atheist developments. Having no clear competitor in the religious sphere, the Catholic Church faces declining attention to its position in public, in politics, and on an individual level. The cleavage is manifest in attitudes among the population towards religion and religiousness, as well as in the political system, where parties can be localized near the two poles of the religious–atheist dimension. In Macedonia, several traditional religious communities inhabit a pluralist sphere and compete for attention in politics and society. Religion and ethnicity (and additionally social status) mostly coincide, which contributes to societal separation. The Macedonian Orthodox Church–Ohrid Archbishopric (MPC²) claims to represent the major ethnic community, the Slavic Macedonians. On the other side, a pluralist Islamic community represents mostly Albanians, Turks, and Muslim Macedonians. Ethno-religious alliances are translated into the political system, where the dominating political parties focus on members of one particular ethnic group as their voters.

A comparative analysis of recent processes in Slovenia and Macedonia promises to reveal interesting insights into two central cleavages of South-Eastern European societies: first between traditional religion and secular movements and, in the second case, between two historical religious communities actively seeking to influence identity. Which general processes and consequences can be revealed, which are important also to larger societies and other regions in Europe?

Historical Remarks

A short historical overview of general developments in Europe is necessary in order to classify the two cases with respect to the relationship between religion and state. The roots of sociology at the end of the 19th century are strongly connected to the first steps of distant scientific reflection of religion in society. Authors of the period were concerned with developments in Western Europe (France, United Kingdom, western lands of present-day Germany) and rearrangements of these relationships within this sub-region of the continent.

The religious–political sphere gradually separated here, within the context of modernization. The successive enforced retreat of traditional religion meant permanent subordination of the church to the state. The Catholic Church lost its function of legitimation of rule in formerly Catholic areas of Europe with the replacement of monarchic by democratic political systems. Today, the relations within these countries follow several models, ranging from official (and established) state churches via systems of cooperation to diverse patterns of separation of state

2 MPC—Makedonska Pravoslavna Crkva (Македонска Православна Црква—Охридска Архиепископија).

and church (Minkenberg 2003). Nevertheless, societies in Western Europe have in common that traditional as well as new religious communities share a relatively high degree of autonomy. The states mostly regulate the relationship to—but generally do not interfere in the internal affairs of—the organized religious associations. In Western European countries, the majority of the population has today developed a distinctly distant but overall tolerant attitude towards religion. It is assumed that this is connected to the finding that religion no longer plays a central role in the political sphere. Processes in societies beyond Western Europe differ from these developments.

Historically, the second major religious region of Europe is the Catholic South—a group of countries including Italy and Spain. Societies in this region are characterized by a close relationship between the church and the state—a long tradition of mutual collaboration and support, and a pattern surviving even monarchist rule by its application in modern dictatorships and later democracies in the 20th century.

The current consequence is that the formerly dominant traditional religious community lost its standing among significant groups of the population, especially among the young. Even if the majority of people ostensibly identify themselves as Catholic, young generations clearly distance themselves from respective major religious institutions. The Catholic Church faces a far-reaching loss of active members, and it remains uncertain whether the organization will ever again attract and influence significant groups within these societies.

The third part of Europe, described as Central Europe in this context, had a significant experience with the Protestant challenge to the Catholic Church. Examples here include large—mostly northern—parts of Germany, in addition to the Czech Republic and the Netherlands. Due to the tension between religious actors and modernization, a significant proportion of the population gradually developed an indifferent attitude towards religion and religious institutions. The pluralization of the religious sphere manifests as a pattern of distance but cooperation in the relationship of religion to present-day politics: The state variously subsidizes traditional religious communities, but otherwise does not significantly interfere in the religious sphere. Religious communities in the region have generally accepted their role as one player among several others within civil society. This position, to some extent preserved the reputation of mainstream religion within society, even if religiousness in its traditional form is declining on an individual level.

The fourth group of societies is located in Eastern Europe, with the core states of the Russian Federation, Poland, and Serbia. They share a long tradition of close relationship between political rule and a single dominant religion. As in the countries of Southern Europe, both spheres overlapped strongly. The important difference

between the four groups is the period of socialist rule in Eastern Europe. Here, religion and its institutions were equated to symbols of the old, monarchist regime; Socialism, as the counter-reaction to the proximity of state and church, encouraged the prosecution, destruction, and expropriation of traditional religion and its organizations. Positioned in an oppositional role to the socialist regime, traditional religious communities were, among others, important actors at the beginning of the transition to democracy in the region; in many cases, they provided crucial parts of the infrastructure of oppositional movements (Pollack 2010:11). Nevertheless, the scale and rapidity of change surprised religious leaders in 1990 (as well as scientists and other groups involved in demanding democracy).

In contradiction to the transitional countries in Central Europe, such as the former East Germany and the Czech Republic, the respective Orthodox and Catholic Churches in Eastern Europe were able to develop permanent access to institutions of political power (Russian Federation) or at least to decisive parts of the established political parties and their elites (Poland). On the side of the population, the most recent data show—in contrast to other regions of the Continent—signs of increasing religiousness in Eastern Europe during the last twenty years (Pollack 2009:37). The process was also briefly observed in the transitional societies of Central Europe³. In Eastern Europe, further development is yet unclear, but the level of religiousness remains high.

When positioning Macedonia and Slovenia in this general, historical–religious classification of European societies, it is necessary to acknowledge that both cases are located in border regions. Slovenia has a strong Catholic background, similar to the second group of Southern European countries. It was a Crown land of the Habsburg Monarchy and located not far from its imperial capital, Vienna. Additionally to Austria, two other neighboring countries—Italy and Croatia—have long traditions of connecting their nationhood with Christian Catholicism. Nevertheless, two shifts in the history of Slovenia laid the basis for indifferent thinking towards religion and its traditional institutions, in this case the Catholic Church. The first shift was the local rise of the Protestant movement after 1550, which was fiercely suppressed by the Catholic Church. The leaders⁴ of the movement were expelled from the Habsburg territories and exiled to ambitious Protestant duchies within the

3 See respective answer patterns in the World Values Survey for the Czech Republic and Eastern Germany, wave 1991/1992 and later. (<http://www.worldvaluessurvey.org>, 28/01/13; questions A006 “Religion important in life” and F025 “Religious denomination”).

4 Primož Trubar (1508–1586) and Jurij Dalmatin (1547–1589) are the most prominent bearers of the Protestant movement in Slovenia. They published several books in Slovene and translated the New Testament, which also represented the first steps in establishing Slovene not only as a spoken, but also written language.

Holy Roman Empire. Consequently, in the Duchy of Carniola (*Herzogthum Krain*) itself, parts of the Slovene population increasingly associated Catholicism with a foreign, intruding power.

The second shift resulted from the constellations during the Second World War. The wartime movements in Yugoslavia fighting for liberation from the fascist occupiers were very diverse in structure, background, and thus their goals. Apart from external influence of the Allies, leftist partisans grew to become the key player of the liberation movements, also because they were distinct from the other groups in one significant way: Their ideology was not based on exclusive forms of ethno-religious nationalism. All other relevant groups seriously seeking political power in Yugoslavia during the war—whether collaborating with the occupiers or not—based their ideology on a mono-ethnic nation connected to a single national religion. Consequently, a significant proportion of the population in Yugoslavia and in the small Slovenian lands, exhausted by ethnic conflict from monarchist Yugoslavia and the Second World War, sympathized with the partisans. After their success in Yugoslavia, the Catholic Church was blamed for its role during the war when it did not support the liberation movement. Thus, a distance between people and the Catholic Church was prescribed during the time of socialism by the state.

These historical roots indicate the positioning of Slovenia in a border region between the Catholic Southern- and a more secular Central Europe. Protestantism differentiated and qualified traditional religion (even though to a small extent); later political ideologies abused, oppressed, excluded, and replaced traditional religious organizations. Thus, the main cleavage in the society of Slovenia today is between the conservative position represented by the Catholic Church and a secular perspective of political and other public issues.

Macedonia, as the second case study, is located in the center of the Balkan Peninsula. Here, mainly two traditional religious denominations, Sunni Islam and Orthodox Christianity, have shaped cultural development and personal identity over centuries. Although significant proportions of the population converted to Islam during the long historical rule of the Ottoman Empire in the region, the majority of Slavic people maintained an association with Orthodox Christianity between 1400 and 1900. The Ottomans, following the Hanafi school of Sunni Islam, applied a form of rule based strictly on guidelines written in the Qur'an and the Sunnah. Formally a religious state, Ottoman rule consequently distinguished people mainly by their faith, regardless of ethnicity or other (previous) forms of identity. Christianity and Judaism are explicitly mentioned in the Qur'an as sharing some common sources with Islam, and therefore were not wiped out but officially acknowledged and granted relative autonomy by the Ottomans. Overall, religious denomination played a crucial role in identifying the Self and the Other, and there

was no significant distinction between the arising ethnic peculiarities within the Empire until the mid-19th century (Karpát 1985:116).

The beginning of the 20th century was marked by the final withdrawal of the Ottoman Empire from the European continent. The consequences in the religious sphere were twofold: Firstly, many Muslims fled towards core Ottoman regions, thereby drastically changing the religious balance in favor of Orthodox Christianity. Secondly, there were frequent changes in the national denomination (e.g., Bulgarian, Serbian) of the institution representing Orthodox Christianity in the territory of today's Macedonia. Finally, the Macedonian appellation after the Second World War was independently organized in 1959 and granted autocephaly in 1967 by political will. Nonetheless, from a long-term historical perspective, it seems to be common that political power determined the name of the Orthodox Church and the faith of people within a territory. Of first interest in the context of this chapter is that Islam was represented as an intruding force by successive nation states of South-Eastern Europe, although it became an autochthonous religion within the Balkans during the preceding centuries. The binding force of Orthodox Christianity was the central contradiction to Islam in order to legitimate the expulsion of Ottoman rule and dominate the area. Secondly, succeeding powers (Serbia, Bulgaria, and Greece) quickly transformed religion into a nationalist instrument, declaring the Orthodox population within the territory of today's Macedonia as belonging to their respective ethnic group, national church, and therefore to their only nation (Ibid:50) in order to claim territory for their newly founded states.

The period from the end of the 19th century until the end of the Second World War was marked by permanent and violent ethnic rivalry, combined with religious elements; throughout the area of Macedonia, a repeated process of 'Serbization' and 'Bulgarization' took place. The effect on the attitude of the population in 1945 towards traditional religion and its relation to politics was similar to the situation in Slovenia—the vast majority of people were tired of ethno-religious conflict, and socialism was seen by many as a new chance to overcome rather than simply obscure the separation between societal groups. The following decades of a relatively high level of inter-ethnic cooperation in Yugoslavia demonstrated these intensions. After the collapse of socialism, Macedonia was constituted as an ethnically-defined nation of the Macedonian people⁵. This decision renewed tensions between social groups based on ethnic and religious sentiments, and revitalized the political focus on this issue. Hence, post-1991, people were focused on the question of ethno-religious

5 The Constitution of The Republic of Macedonia, adopted 17/11/1991, emphasizes in its preamble "[...] the historical fact that Macedonia is established as a national state of the Macedonian people [...]". Other ethnic groups are mentioned as nationalities living in Macedonia, but not as constituting groups of the nation. Source: <http://www.verfassungsvergleich.de/>, 28/01/12.

belonging, and the proportion of the population with indifferent attitudes towards religion has subsequently declined to an insignificant level today.

The described historical path-dependencies also imply the positioning of Macedonia in a border region, yet between the Orthodox Eastern Europe and the former Ottoman-ruled region which is characterized by Islam today. Individual identity within this society is based predominantly on ethnic reference with constituting religious elements. Consequently, Macedonia shares main characteristics with the Orthodox Eastern countries regarding the development of religion after 1991: A revitalized role of religion in politics and the public spheres, as well as an increasing level of religiousness at the individual level.

Theoretical Approaches of Religion and the State

These historical path-dependencies frame the following reflection of theoretical approaches, which are concerned with the interplay of religion and politics. Established concepts of social science classifying the relationship between church and state mostly focus on developments in societies in Central- and especially in Western Europe. Here, a central problem of Christianity—the division between the Earthly and Heavenly kingdom, and thus the two powers ruling in the respective ‘worlds’—shaped power struggles for centuries (Robertson 1987:153). Unique in comparison to other parts of Europe (and the world) was the successive separation, cumulating in their radical schism during the course of the French Revolution. The leap meant the final subordination of church to the state in the region until today. These developments constituted the framework for theorists who created the concepts of church and state described now. It is also necessary to acknowledge the Christian context, because religions and respective organized communities have various organizational structures and differing mental orientation. While the first dimension describes the organization of the hierarchic form of the institution representing a religion, the second distinguishes religions via their inner- or other-worldly orientation⁶. When focusing on Macedonia, where approximately 30% of the population follows Sunni Islam, it is important to emphasize that this religious confession has generally the same inner-worldly orientation as Christianity, but an

6 A typology of religions on the basis of the two dimensions ‘structure’ (weak/developed) and ‘orientation’ (inner-/otherworldly) was developed by Smith (1974) and replicated by Robertson (1987:157). While the structural dimension is self-explanatory, the mental dimension of orientation means the sphere with which the central religious-based activity of respective adherents is identified. Innerworldliness describes a group ethos that emphasizes reshaping the contemporary world according to traditional doctrines, whereas otherworldliness is the view that existing worldly circumstances are largely to be accepted.

entirely different structure—less hierarchical in the earthly organization, connecting the believer more directly to God compared to the Christian counterpart. The consequence is that religious dignitaries as the ‘earthly’ representatives cannot claim an absolute and final interpretation of the religion for today, as within the ecclesiastical Christian structures of Catholic, Orthodox, or Evangelical confession.

When reviewing classical concepts of religion and the state, one experiences that early sociologists like Max Weber followed what today would be described as an interdisciplinary approach. Weber combined sociologic, economic, cultural, and theological findings in his work at the beginning of the 20th century. Of primary importance regarding the issue of religion and the state is Weber’s description of three general, ideal types (*‘Idealtypen’*) of rule: the traditional, the charismatic, and the legal-rational form. Within each ideal type, institutionalized religion has a specific position towards the state, which makes the approach promising in the context of this paper.

The *traditional* ideal type of rule is generally characterized by a very close relationship between religion and the state. The spheres give mutual legitimation and mostly overlap. Here, Weber divides the category into two subunits: *hierocracy* or *theocracy*⁷ on one side, in which earthly power is dominated by religion; and on the other *caesaropapism*, in which there is close subordination of church to political power (Weber 1922:200). This general category of traditional rule describes the traditional European monarchies that governed in Europe throughout the Middle Ages.

The second ideal type, *charismatic rule*, historically emerges directly after—and as the fierce counterpart to—the traditional form. Here, established religion and religious communities are excluded from political and civic life, and are replaced by doctrines of a movement with a charismatic leader, comprising an independent ideology⁸. Religion is tolerated by politics only during the first steps of establishing the charismatic rule if that serves the political goals of including wider parts of the population in the political movement, and to support and contribute to the legitimation of its leadership.

In terms of the relationship between religion and the state, the third ideal type, *legal-rational rule*, is positioned between the two forms described above. Here, politics and religion are not identical or mainly overlapping, but are separated, and religious communities enjoy relative autonomy. The state bases its legitimation not

7 Theocracy is subdivided into *incarnate*, direct rule of the founder of the religion; and *theocratic*, direct rule of priests of a small religious circle.

8 The political ideologies were constituted in contrast to religion with ‘earthly-based’ sources of legitimation. The historical background in this case was fascist Italy and the Socialist Soviet Union in the 1920s.

exclusively on religious or ideological foundations: the main characteristics of the ideal type are a constant confirmation of—and back-coupling to—the population as the source of legitimation of rule. Traditional religious communities may be acknowledged or slightly supported, although not necessarily. Subsumed within the category of legal-rational rule, the societies of Western Europe developed various forms of a general separation of church and state during the 19th and 20th centuries within the structures of democracy.

Weber set the three described ideal types into a chronological continuum, where the charismatic form overthrows the traditional and will be finally succeeded by legal-rational rule. These assumptions were accompanied by the observation that the relationship between religion and state in the societies of Europe became more diverse via the specific character of modernization. Following Weber's differentiation, monarchy was succeeded by charismatic rule; however, after 1945, the conflict line dividing the continent was between the democratic capitalist and the 'charismatic' socialist regimes. Consequently, charismatic and legal rule became a matter of more specific differentiation; social science now concentrated on the various political dominations of religion (Murvar 1967:71). In his description of forms of religious legitimation of the state, Roland Robertson advanced the concept of Weber and added *Eratianism* as a fourth ideal type (Robertson 1987:157), characterized by a separation of church and state and a low degree of autonomy on the part of religion.

A decade after Robertson, Juan J. Linz acknowledged the plural forms of treatment of religion by the two societal and political systems in Europe within one typology and generated five categories of church/state relations, organized according to an increasing distance of both spheres: theocracy/caesaropapism, politicized religion, friendly separation, hostile-laicist separation, and political religion as substitute (Linz 1996:134). Linz emphasized that the framework was not an ordinal dimension with end points; rather, it was arranged as a circle wherein the categories of political religion and caesaropapism are connectable because of the high level of integration between religion and state in both systems, regardless of the origin of the first element. Linz' typology is open for a wide range of forms of rule and therefore valuable to the context of this book, which is concerned with societies in transition. Linz' concept was applied to Eastern Europe in an analysis of church/state relations in Russia over a long-term historical perspective, and comprehensively advanced for this case (Riedel 2006:326).

Thus, the concept proposed by Linz proved useful for qualitative analysis of transitional societies in the region. In order to compare recent state/church relationships in Slovenia and Macedonia, additional quantitative assessment tools should be considered. Which concepts permit the evaluation of recent patterns?

The collapse of socialism left only democratic regimes in Europe, and therefore the concept of a general separation of politics and religion. The consequence for theoretical approaches to religion and state was the development of typologies focusing on the status of religion within democratic systems (see Fig. 1.1). Most prominent in this context is the categorization of Chaves and Cann, who provide a continuum between the three categories of: a) An established state-church; b) systems of cooperation between state and church; c) the complete separation of the two spheres (Chaves and Cann, 1992:280). They used six indicators that are similar to a Christian understanding of the interplay between the two spheres, of religion itself and of institutionalized religious communities⁹.

Their concept was slightly modified by Detlef Pollack, who applied the approach to the classification of patterns in post-transition societies of Eastern Europe. He used the variable of the relations between state and church (plus the degree of religious plurality) in a society to explain the tremendous differences in religious vitality across Eastern Europe (Pollack 2002:18). Pollack retained the three general categories of Chaves and Cann, but focused the indicators more specifically on aspects of the involvement of traditional religious organizations in state institutions¹⁰.

In 2003, Michael Minkenberg analyzed religion and politics in Western European democracies. While keeping the three general categories in state/church relations of Chaves and Cann as the basis for classification, Minkenberg widened the pool of indicators in regard to their concept and the one of Pollack, and thus expanded the scope (Minkenberg, 2003:128). The mentioned approaches represent approved concepts of social science, measuring the interdependence of religion and state within democracies (Kippenberg and Schuppert 2005:173). Nevertheless, the last decade was marked by developments in Eastern Europe in which the degree of democratic legitimation of the state significantly decreased or at least varied to a great extent (cf., Russian Federation, Ukraine, Moldova). Notwithstanding the multiple reasons, it is currently the case that traditional religion achieved unexpected but meaningful access to political power in several societies of Eastern Europe.

9 The six indicators are: a) the existence of a single official state-church, b) the official recognition of selected denominations, c) state interference in the appointment of religious dignitaries, d) the personnel of a religious community are paid (fully or partly) by the state, e) the existence of a church tax, and f) state investment in constructing/maintaining buildings of religious worship (see also Kippenberg and Schuppert, 2005:173). Each indicator is coded yes/no, so that the range of the variable is between zero (full separation) and six points (established state-church).

10 These are: a) existence of a state-church (two points), b) theological faculties at state universities, c) state-financed religious education at school, d) pastoral care in prisons and the military, and e) financial support (via taxes, etc.) of religious communities by the state (Pollack 2002:18). Coded as Chaves and Cann (1993), except indicator a), which is coded 0–2. Range 0 to 6.

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