

European Association for Evolutionary Political Economy

# Summer Schools

# 1997 Prospectus

**‘Institutions and Technology: Interdisciplinary Perspectives on  
European Economy and Society in an Era of Rapid Change’**

*For young academics, postgraduates and other researchers*

*Conducted in English*

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EAEPE Summer School Organising Committee

November 1996

c/o Geoff Hodgson, The Judge Institute of Management Studies, University of Cambridge,  
Trumpington Street, Cambridge CB2 1AG, UK.

All information in this prospectus is subject to contract with the European Commission.

# Introduction

A major European Commission (EC) grant has been awarded to the European Association for Evolutionary Political Economy (EAEPE) for a sequence of three summer schools for young academics and researchers at the post-Masters, PhD and post-doctoral level.

The first summer school was held in July 1996 in Ribadesella in Spain. Reactions by participants to the 1996 summer school include: 'Congratulations on this tremendous success - thanks'; 'Overall a real success', 'Excellently organised and stimulating'; 'I found the summer school very helpful'; 'I can't tell you how much I enjoyed meeting such an interesting and amiable group of people in such a wonderful setting'; 'In general I enjoyed very much the summer school and I thank you for all your efforts'; 'Congratulations for the organisation, and thank you for all the energy you put in this summer school to make it successful'.

The locations of the next two summer schools are:

## **July 1997 in Greece and July 1998 in Ireland**

under the overall title:

### **'Institutions and Technology: Interdisciplinary Perspectives on European Economy and Society in an Era of Rapid Change'.**

About 65 participants will attend each summer school. The financial grant from the European Commission means that participant tuition fees, accommodation and travel costs for citizens of the European Union (EU) and Associated States (presently Iceland and Norway) are heavily subsidised. Further details of this financial support are given below. (Without a subsidy, the full tuition fee for every 1997 participant - EU and non-EU - is 575 ecu.)

Each summer school is open to nationals of the European Union and Associated States and to a limited number of other participants. Applicants must normally be in possession of a Masters or other higher degree, and have some significant and advanced knowledge of economics and social theory. All participants shall be 35 years or under at the time of each summer school and fluent in English.

The schools are organised by the European Association for Evolutionary Political Economy (EAEPE), a major association of social scientists with considerable scientific and organisational expertise. EAEPE has a wide European network involving key experts.

## **Outline of the Scientific Content of the Summer Schools**

We are living in an era of rapid institutional and technological change. In the past, economists and other social scientists have had some success in modelling and formulating policies in periods of relative stability, notably during the 1950s and 1960s. However, in an era of instability and turbulence many of the old theories and techniques have been found wanting.

Nevertheless, exciting scientific developments are now taking place which promise to produce theories and policies which are more useful and effective, especially in a European context. Interlinked work in evolutionary economics, institutional economics, economic

methodology, organisation studies, economic sociology and technology policy is highly innovative, rapidly evolving and has already demonstrated clear policy usefulness.

The three summer schools address a number of interconnected topics, drawing on a wide range of ideas from a number of disciplines, including economics, sociology, geography and philosophy. The summer schools will address research which is currently at the frontier of scientific knowledge and which does not appear on most postgraduate university curricula.

Participants benefit from the interdisciplinary climate and the transfer of ideas between academic disciplines. The summer schools are designed to encourage creative and innovative thinking at the frontiers of scientific enquiry, partly by asking participants to move across disciplinary boundaries and to learn from others working in different academic areas.

The material covered by the summer schools has major theoretical and policy implications, particularly in the areas of technological and institutional change. Major effects are expected on policy-making in Europe, especially in regard to economic policy, corporate strategy, science and technology policy and problems of institutional transition and design.

As well as a foundation course in theory and methodology, participants are asked to choose courses from a number of closely related themes. All lecturers are leading researchers in the area. Participants benefit from exposure to ideas at the cutting edge of economics and social science. They will gain key knowledge for their own research in an atmosphere of intense intellectual interchanges.

### **Participant Financial Support**

The application procedure and criteria are explained elsewhere in this prospectus. See the section 'Recruitment of Participants'.

Successful applicants who are nationals of the European Union and Associated States (presently Iceland and Norway) will have their meals (with the exception of the lunches on Saturday and Sunday), and accommodation costs for 10 nights, paid. Tuition fees will be heavily subsidised. Each participant in this category will be asked to pay just £100 towards the cost of tuition, one half in advance and one half upon registration. (The full tuition fee for every 1997 participant is 575 ecu.) Travel costs - cheapest public transport only, excluding cars and taxis - will be reimbursed up to a maximum of £250 per person.

A limited number of scholarships, financed by private donors, are available for participants outside the European Union. These scholarships will finance up to 100% of tuition fees, meals and accommodation costs (with the exception of the lunches on the Saturday and Sunday). As a result, participants in receipt of such scholarships shall not be required to pay a (£50) deposit. For recipients of scholarships, travel costs by cheap public transport - excluding cars and taxis - will be reimbursed up to a maximum of £250 per person.

Finally, some places are available for participants who wish to pay for their own fees and accommodation. Participants in this category will be charged £950 or US\$1500. This is partly subsidised by EAEPE and covers the cost of meals (except lunches on the Saturday and Sunday), accommodation and tuition.

*All applicants must fill in an appropriate application form.* If there are no application forms with this prospectus then write to Elaine Davidson, Sheffield University Management School, 9 Mappin Street, Sheffield, S1 4DT, UK (e.davidson@sheffield.ac.uk) for copies.

Completed application forms must be returned to Geoff Hodgson, The Judge Institute of Management Studies, University of Cambridge, Trumpington Street, Cambridge, CB2 1AG, UK, by 31 March 1997.

# Scientific Information

(As Published in the 1996 Prospectus)

## 'Institutions and Technology: Interdisciplinary Perspectives on European Economy and Society in an Era of Rapid Change'

### Social Science in an Era of Complexity and Rapid Transformation

Rapid technological, structural and institutional change in Europe and elsewhere is not only disruptive for ordinary citizens: it is creating greater uncertainty and difficulty for policy makers. The globalisation of the world economic system, the collapse of the Eastern Bloc after 1989, the opening up of new markets from Portugal to the Pacific, and the further integration of the European Union itself - they all create major challenges in the spheres of both theory and policy.

At the same time, developments in the traditional social sciences are impaired by stubborn barriers between disciplines, the frequent adoption of static modes of analysis, and a common tendency to pursue mathematical technique for its own sake. These factors often act to the detriment of theoretical realism and policy usefulness, and can divert scarce resources for scientific research into less operational channels.

Nevertheless, a number of seminal developments have occurred in the social sciences in the last 15 years which together provide the outlines and rationale for new, superior approaches. A milestone was the publication in 1982 of Richard Nelson and Sidney Winter's book *An Evolutionary Theory of Economic Change*. This broke from the static, equilibrium-oriented theorising which had characterised economics in the past and provided the foundation of an evolutionary framework in which elements such as human learning and structural change are addressed more directly and adequately. This work has already had major policy implications, from strategic management to technology policy (Nelson, 1993; Nelson and Winter, 1982).

Over the same period, increasing interest has been shown, by economists and other social scientists, in institutional approaches to economics. On the one hand there have been important developments in the so-called 'new' institutionalism, such as Oliver Williamson's work on the firm and Douglass North's studies of economic history and institutional change (North, 1981, 1990; Williamson, 1975, 1985). On the other hand the 'old' institutionalism, previously in the intellectual doldrums of the 1950s and 1960s, is now showing clear signs of revival, and especially in Europe (Hodgson, *et al*, 1994). Paul David's (1985) and Brian Arthur's (1989) influential work on lock-in, and North's (1990) recognition of the importance of path-dependency in institutional evolution, for instance, both opened up important common ground with earlier institutionalists such as Thorstein Veblen.

Overall, various strains of scientific enquiry - often using different labels such as 'Schumpeterian', 'Austrian', 'socio-economic', 'institutionalist' and 'evolutionary' - are converging on a number of key issues and themes and creating exciting new pathways of scientific research in the social sciences.

Taking all these developments as a whole, common concerns and themes include:

- the nature of social and economic institutions
- the causes of institutional, structural and technological change
- the role of ideas and culture in socio-economic transformation
- the nature and role of human learning
- the nature of knowledge, its growth and diffusion
- the wellsprings of creativity and novelty
- the institutional embeddedness of technology
- the role of regional, national and supra-national government and institutions
- the instruments and objectives of policy in a complex and rapidly-changing age

The policy implications deserve emphasis. As an example consider technology policy. There is now a consensus that economies require institutional structures that support research, innovation and technological diffusion and absorption. Comparative studies (Nelson, 1993; Lundvall, 1992) have shown that economies with less conducive institutional structures are less likely to succeed. A policy implication is that there is a role for EU to co-ordinate national policies, disseminate best practices, and encourage the kind of cooperation in research that develops competences and exploits economies of scale.

Regional as well as national issues are involved in many of these themes. There is huge regional as well as national disparity in the EU. At the same time, the processes of increasing globalisation are associated with the increasing mobility of capital and labour, and countervailing processes of cultural homogenisation. This, in turn, raises the question of the scope of national governments to deal with persistent problems such as unemployment and inflation, and the role of economic and industrial policy at the European level.

Scientific work addressing such themes is usefully employing theories and ideas developed by institutionalists, evolutionary economists and other social scientists. Developments in complexity theory and evolutionary theory, for instance, are suggesting new and more innovative ways of thinking about such problems, implying a break from the mechanistic paradigm that has pervaded social sciences in the past (Dosi *et al*, 1988; Hodgson, 1993; Mirowski, 1989; Waldrop, 1992).

## References

- Arthur, W. Brian (1989) 'Competing Technologies, Increasing Returns, and Lock-in by Historical Events', *Economic Journal*, **99**(1), March, pp. 116-31.
- David, Paul A. (1985) 'Clio and the Economics of QWERTY', *American Economic Review (Papers and Proceedings)*, **75**(2), May, pp. 332-7.
- Dosi, Giovanni, Freeman, Christopher, Nelson, Richard, Silverberg, Gerald and Soete, Luc (eds) (1988) *Technical Change and Economic Theory* (London: Pinter).
- Hodgson, Geoffrey M. (1993) *Economics and Evolution: Bringing Life Back Into Economics* (Cambridge, UK and Ann Arbor, MI: Polity Press and University of Michigan Press).
- Hodgson, Geoffrey M., Warren J. Samuels and Marc R. Tool (eds) (1994) *The Elgar Companion to Institutional and Evolutionary Economics* (Aldershot: Edward Elgar).
- Mirowski, Philip (1989) *More Heat Than Light: Economics as Social Physics, Physics as Nature's Economics* (Cambridge: Cambridge University Press).

- Nelson, Richard R. (ed.) (1993) *National Innovation Systems: A Comparative Analysis* (Oxford: Oxford University Press).
- Nelson, Richard R. and Winter, Sidney G. (1982) *An Evolutionary Theory of Economic Change* (Cambridge, MA: Harvard University Press).
- North, Douglass C. (1981) *Structure and Change in Economic History* (New York: Norton).
- North, Douglass C. (1990) *Institutions, Institutional Change and Economic Performance* (Cambridge: Cambridge University Press).
- Waldrop, M. Mitchell (1992) *Complexity: The Emerging Science at the Edge of Order and Chaos* (New York: Simon and Schuster).
- Williamson, Oliver E. (1975) *Markets and Hierarchies: Analysis and Anti-Trust Implications: A Study in the Economics of Internal Organization* (Free Press).
- Williamson, Oliver E. (1985) *The Economic Institutions of Capitalism: Firms, Markets, Relational Contracting* (London: Macmillan).

## **Expected Impact**

The three summer schools cross disciplinary boundaries and gather together the many threads of the research described in the preceding section. They are designed for postgraduate researchers engaged in research in university or in industry. The main objectives are as follows:

- To acquaint the participants with leading-edge research in the study of institutions and organisations, evolutionary economics, and the theory of technological change.
- To provide a springboard for further research in the general area, of both a theoretical and policy-oriented kind.
- To provide an unique opportunity for interdisciplinary interaction on the frontiers of modern social science that is likely to increase significantly the probability of publication of valuable work in the area in the scientific journals.

## **Courses**

The foundation course is offered in each year and is designed to present the participants with leading edge research in the area and establish the conceptual and methodological foundations of the approaches. Participants take the foundation course when they join the summer school programme.

Other courses are based on specific themes. These themes closely relate with each other and involve a maximum amount of interdisciplinary interaction. There is a strong emphasis on the relevance for Europe and European policy throughout. Participants are asked to choose courses from eight connected themes, distributed over the three years.

For details of the foundation course and the theme courses see pages 10-20 below.

## Recruitment of Participants

To register for an EAEPE summer school, each applicant must normally:

1. Be aged 35 or under at the time of the summer school;
2. Be in possession of a Masters or other higher degree, and have some significant and advanced knowledge of economics and social theory;
3. Be pursuing research at a university or within industry.

As the summer schools are conducted in English, participants must be fluent in that language.

European Commission funding is for nationals of the European Union and Associated States (presently Iceland and Norway). In 1997 these participants will be asked to pay a fee of £100 towards the total cost of tuition (575 ecu). In addition there is a small amount of money available to fund scholarships for applicants from other countries. Summer School participants in receipt of full scholarships will not be asked to pay a tuition fee.

By contractual agreement with the European Commission:

- 12 places on each summer school will be reserved for women from the EU or Associated States.
- 12 places on each summer school will be reserved for those with a place of work in a less-favoured region of the EU or Associated States.
- 12 places will be reserved for researchers working in, or with close identifiable contacts with, industry within the EU or Associated States.

Note that the aforementioned quotas place no upper bound on the numbers involved in these four categories. They are designed to favour representation from participants in these groups.

Finally, to ensure as widespread a distribution of nationalities as possible:

- No more than 20 per cent of the EU participants shall be nationals of any one country.
- No more than one-third of the EU participants shall have a place of work in any one country.

Some places are available for participants who wish to pay for their own fees and accommodation. Participants in this category will be charged £950 or US\$1500. This is partly subsidised by EAEPE and covers the cost of meals (except lunches on the Saturday and Sunday), accommodation and tuition.

Apart from the above measures, applicants will be selected purely on merit. The capacity of each summer school will be about 65. Applicants will be asked to submit an application form by a specified date in the year in which they wish to attend, and will be notified whether or not they are accepted within 6 weeks of this date.

To encourage female participation, and subject to sufficient demand, a subsidised crèche will be provided. Participants wishing to use the crèche facilities must declare this on the application form.



Participants on the 1996 or 1997 summer schools are automatically permitted to attend any subsequent summer school, as long as they are aged 35 or under at the time of the summer school in question. However, this does not necessarily imply that funding will be available for such participants.

## **Application Procedure**

*All applicants must fill in an appropriate application form.* There is an application form for new participants and a different form for those who attended the 1996 summer school. If there are no application forms with this prospectus then write to Elaine Davidson, Sheffield University Management School, 9 Mappin Street, Sheffield, S1 4DT, UK for further copies.

*In addition, participants who have not attended the 1996 summer school are asked to supply a letter of reference from a recognised academic authority in the area who is familiar with the research work of the participant.*

Persons who attended the 1996 summer school may claim a place on the 1997 summer school, clearly indicating on the form whether they have funding, or are applying for EC or other financial support. EC funding is for citizens of the European Union, Iceland or Norway who are aged 35 or under. Applicants for EC funding who attended the 1996 summer school must also submit a cheque for £50. This cheque will be returned if the applicant is not allocated a funded place on the summer school. If a funded place is offered then the £50 fee becomes non-returnable.

Applicants for EC funding who have not attended the 1996 summer school will be asked to submit a cheque for £50 at a later stage, if and when they are offered a place. If a funded place is offered and accepted then the £50 fee becomes non-returnable.

If you wish to pay for your own accommodation and fees (£950 or US\$1500 per person per summer school), please indicate in a letter with the application form.

Completed application forms must be returned to Geoff Hodgson, The Judge Institute of Management Studies, University of Cambridge, Trumpington Street, Cambridge, CB2 1AG, UK, by 31 March 1997.

It is hoped to inform all applicants of the decision by the middle of May.

Registration for the 1997 Summer School will commence at the Hotel Panorama, Galatos, near Hania, Crete, Greece at 15.00hrs on Tuesday 15 July. Upon registration, participants with EC funding will be asked to pay the remaining half (£50) of the fee of £100.

*All successful applicants will be asked to agree to stay for the whole of the summer school, that is for 10 nights; arriving no later than 15 July and departing no earlier than 25 July.*

## **Optional Mountain Walking Expedition**

Successful applicants may wish to join the optional mountain walking expedition prior to the summer school itself. This is designed to help participants to get to know each other. See Appendix 3 for details.

## Locations and Teaching Resources

Each summer school involves 9½ days attendance, including 2 free days at the weekend. Participants agree to take up residence for 10 days, in a closed environment conducive to study.

Accommodation will be rented for 10 nights for about 65 people. Multiple conference rooms will be available for simultaneous use. Summer Schools will be held in the following locations. The dates for 1998 are provisional:

<b>Year</b>	<b>Arrival Date</b>	<b>Departure Date</b>	<b>Location</b>
1997	Tue 15 July	Fri 25 July	Hania, Crete, Greece
1998	Tue 14 July	Fri 24 July	Ireland

Each participant will receive a reading list of key articles (see below) and some preliminary reading material. Key books will be available at the summer school itself. Four or more lecturers will be in attendance at any one time in each summer school, including one or two keynote lecturers who will attend part of each summer school. Keynote lecturers are as follows:

1997	Philip Mirowski, University of Notre Dame, USA
1997	Ulrich Witt, University of Linz, Germany
1998	Giovanni Dosi, University of Rome, Italy
1998	Anthony Giddens, University of Cambridge, UK

### **The Location of the 1997 Summer School**

The location of the 1997 summer school is the Hotel Panorama, Galatos, near Hania, Crete, Greece. The hotel is on the Hania-Kastelli coast road, 4km west of Hania town centre, and is 18km west of Hania airport.

Participants should plan to arrive at the Hotel Panorama on Tuesday 15 July before 17.00 at the latest. You should plan your departure on the morning of Friday 25 July at the earliest.

Crete has airports at Hania and Iraklion. Cheap and regular bus services connect Hania with Iraklion and Rethimnon. The Iraklion to Hania bus takes about 3 hours. There are ferries from Piraeus (near Athens on the Greek mainland) to Hania, Rethimnon and Iraklion. These ferry trips take about 12 hours. There are also ferries direct from Italy.

Hania is close to the famous White Mountains and the longest gorge in Europe - the Gorge of Samaria. To encourage a spirit of camaraderie among the participants, an optional mountain walking expedition has been organised prior to the summer school. See details in **Appendix 3**.

# Structure and Content

A combination of lectures, seminars, group work and individual tuition will characterise each summer school.

Individual tuition will be provided by arrangement with the lecturer, during periods of study time. In addition, study and free times will be used to develop informal contacts between participants. For group work, participants will be split into grouplets of 3-5. Each grouplet will be asked to make a 20 minute presentation at the end of the school. Two keynote lectures by an internationally distinguished researcher are planned for each summer school. All participants are expected to attend these keynote lectures.

Participants attend the foundation school course at the point where they join the summer school programme (unless special grounds are accepted for joining T3 in 1997 and T6 in 1998 instead). Topics covered will include: the old and the new institutionalism; cumulative causation versus equilibrium; evolutionary versus mechanical metaphors; open and closed systems; the limits of prediction in economics; the nature and necessity of habits, rules and institutions; the social embeddedness of markets and firms.

The plan of lectures and seminars (details are provisional for 1998) is as follows:

## **1997**

Foundation Course (for participants not attending in 1996)

Participants of the 1996 summer school will be asked to attend the following theme course:

T3. Socio-Economic Evolution: Evolutionary Metaphors, Innovation and Technology

In the second part of the course participants will be asked to join one of two themes:

T4. Advanced Methodology: Philosophical Issues at the Core of the Social Sciences

T5. Technical Change & Employment Growth in Europe: Theoretical Issues and European Policy Perspectives

## **1998**

Foundation Course (for participants not attending in 1996 and 1997)

Participants of the 1996 or 1997 summer schools will be asked to attend the following theme course:

T6. Economy and Society: Interdisciplinary Perspectives on their Interaction and Interpenetration

In the second part of the course participants will be asked to join one of two themes:

T7. Advanced Theory: Theoretical Frontiers of Institutional and Evolutionary Economics

T8. Industrial Districts, Regions and Globalisation: Theoretical Issues and European Policy Perspectives

The thematic plan is represented diagrammatically, with dates, as follows:

## July 1996 - Ribadesella, Asturias, Spain

### Foundation Course:

Institutional and Technological Change -  
Introductory Theory and Methodology

### T1. Firms and Markets:

Interdisciplinary Perspectives on their Nature,  
Boundaries and Functions

### T2. Systems of Innovation:

Theoretical Issues and European Policy  
Perspectives

## July 1997 - Hania, Crete, Greece

16-18 July

### Foundation Course:

Institutional and Technological Change -  
Introductory Theory and Methodology

21-23 July

### T4. Advanced Methodology:

Philosophical Issues at the Core of the Social  
Sciences

### T3. Socio-Economic Evolution:

Evolutionary Metaphors, Innovation and  
Technology

### T5. Technical Change & Employment Growth in Europe:

Theoretical Issues and European Policy  
Perspectives

## July 1998 - Ireland

(provisional structure and dates)

15-17 July

### Foundation Course:

Institutional and Technological Change -  
Introductory Theory and Methodology

20-22 July

### T7. Advanced Theory:

Theoretical Frontiers of Institutional and  
Evolutionary Economics

### T6. Economy and Society:

Interdisciplinary Perspectives on their  
Interaction and Interpenetration

### T8. Industrial Districts, Regions and Globalisation:

Theoretical Issues and European Policy  
Perspectives

## Timetables and Dates

### 1997 - Hania, Crete, Greece

Date	9.30-11.00	11.30-13.00	13.30-17.00	17.00-18.30
Tue 15 July 1997			Registration	Welcoming Plenary
Wed 16 July 1997	1 Foundation + 1 Theme Lecture	4 Seminar Groups	Study Time	1 Foundation + 1 Theme Lecture
Thu 17 July 1997	1 Foundation + 1 Theme Lecture	4 Seminar Groups	Study Time	1 Foundation + 1 Theme Lecture
Fri 18 July 1997	1 Foundation + 1 Theme Lecture	4 Seminar Groups	Study Time	Keynote Lecture
Sat 19 July 1997	FREE TIME	FREE TIME	FREE TIME	FREE TIME
Sun 20 July 1997	FREE TIME	FREE TIME	FREE TIME	FREE TIME
Mon 21 July 1997	2 Theme Lectures	4 Theme Seminars	Study Time	2 Theme Lectures
Tue 22 July 1997	2 Theme Lectures	4 Theme Seminars	Study Time	2 Theme Lectures
Wed 23 July 1997	2 Theme Lectures	4 Theme Seminars	Study Time	Keynote Lecture
Thu 24 July 1997	9.30-14.00: 9x2 Grouplet Presentations			16.00-18.30: Final Plenary: Round Table and Feedback

### 1998 - Ireland (Provisional Times and Dates)

Date	9.30-11.00	11.30-13.00	13.30-17.00	17.00-18.30
Tue 14 July 1998			Registration	Welcoming Plenary
Wed 15 July 1998	1 Foundation + 1 Theme Lecture	4 Seminar Groups	Study Time	1 Foundation + 1 Theme Lecture
Thu 16 July 1998	1 Foundation + 1 Theme Lecture	4 Seminar Groups	Study Time	1 Foundation + 1 Theme Lecture
Fri 17 July 1998	1 Foundation + 1 Theme Lecture	4 Seminar Groups	Study Time	Keynote Lecture
Sat 18 July 1998	FREE TIME	FREE TIME	FREE TIME	FREE TIME
Sun 19 July 1998	FREE TIME	FREE TIME	FREE TIME	FREE TIME
Mon 20 July 1998	2 Theme Lectures	4 Theme Seminars	Study Time	2 Theme Lectures
Tue 21 July 1998	2 Theme Lectures	4 Theme Seminars	Study Time	2 Theme Lectures
Wed 22 July 1998	2 Theme Lectures	4 Theme Seminars	Study Time	Keynote Lecture
Thu 23 July 1997	9.30-14.00: 9x2 Grouplet Presentations			16.00-18.30: Final Plenary: Round Table and Feedback

### Additional Scholastic Activities

In addition to all the lectures and seminars outlined above, tuition will be provided to participants on a one-to-one basis during periods of study time and free time, by arrangement.

Some time is available, particularly at the weekends, for additional scholastic activities. Some further talks and discussion groups may be scheduled. The opportunity also exists for researchers to organise presentations and discussions of their own work. Such extra participations are strongly encouraged.

# Lecturers and Syllabi for 1997

\* indicates essential reading, ideally to be completed prior to the summer school

## Foundation Course

### Outline Syllabus

The old and the new institutionalism  
The limits to rationality: power and choice  
Problems in analysing open and dynamic systems  
Problems of complexity and change: organicism, atomism, holism, individualism  
Mechanical and biological metaphors  
Habits, routines and institutions  
Novelty, innovation and change  
Exchange, markets and firms.

### Lecturers and Tutors

Geoffrey Hodgson (University of Cambridge, UK - leader of foundation course); Tony Lawson (University of Cambridge, UK); Klaus Nielsen (Roskilde University, Denmark); Andrew Tylecote (University of Sheffield, UK).

### Seminar Topics

What should be the role of econometrics and mathematical modelling in economics? What is the significance of the distinction between open and closed systems? The meaning of abstraction. The nature of institutions. What is the key difference between the old and the new institutionalism? Can institutions be explained by game theory? Are institutions enablers or constraints? Endogenising preferences. Methodological individualism, for and against. The limits of rational economic man. Cumulative causation versus equilibrium. What is the meaning of novelty and innovation?

### Indicative Reading

- \* Backhouse, Roger E. (ed.) (1994) *New Directions in Economic Methodology* (London: Routledge).
- \* Clark, Norman G. and Juma, Calestous (1987) *Long-Run Economics: An Evolutionary Approach to Economic Growth* (London: Pinter).
- \* Dosi, Giovanni, Freeman, Christopher, Nelson, Richard, Silverberg, Gerald and Soete, Luc (eds) (1988) *Technical Change and Economic Theory* (London: Pinter).
- Hall, Peter (1994) *Innovation, Economics and Evolution* (Hemel Hempstead: Harvester Wheatsheaf).
- \* Hodgson, Geoffrey M. (1988) *Economics and Institutions: A Manifesto for a Modern Institutional Economics* (Cambridge: Polity Press).
- Hodgson, Geoffrey M. (ed.) (1993) *The Economics of Institutions* (Aldershot: Edward Elgar).
- Hodgson, Geoffrey M., Warren J. Samuels and Marc R. Tool (eds) (1994) *The Elgar Companion to Institutional and Evolutionary Economics* (Aldershot: Edward Elgar).
- \* Lukes, Steven (1974) *Power: A Radical View* (London: Macmillan).
- Milgrom, Paul and Roberts, John (1992) *Economics, Organisation, and Management* (Englewood Cliffs and London: Prentice-Hall).

North, Douglass C. (1990) *Institutions, Institutional Change and Economic Performance* (Cambridge: Cambridge University Press).

Smelser, Neil J. and Swedberg, Richard (eds) (1994) *Handbook of Economic Sociology* (Princeton).

Thomson, Ross (ed.) (1993) *Learning and Technological Change* (New York: St Martin's).

\* Veblen, Thorstein B. (1919) *The Place of Science in Modern Civilisation and Other Essays* (New York: Huebsch). Reprinted 1990 (New Brunswick, NJ: Transaction).

## **T3. Socio-Economic Evolution: Evolutionary Metaphors, Innovation and Technology**

### **Outline Syllabus**

The role of metaphor in scientific enquiry

The mechanical metaphor in economics

The uses and abuses of biological metaphors in economics

Are natural and social evolution comparable?

Evolution, novelty and innovation - crucial ingredients

Gradualism versus punctuated equilibrium in technological change

The evolutionary metaphor and technological change.

### **Lecturers and Tutors**

Geoffrey Hodgson (University of Cambridge, UK - leader of T3); Philip Mirowski (University of Notre Dame, USA - keynote lecturer); Ulrich Witt (University of Jena, Germany - keynote lecturer).

### **Seminar Topics**

Is metaphor in science more than a literary frill? The constitutive role of metaphor in science. Physical metaphors and the rise of neoclassical economics. Does neoclassical economics ape physics? Should economics be rid of all natural metaphors? The advantages and disadvantages of metaphors from evolutionary biology. The historical fall and rise of biological metaphors in economics - some lessons for today. Core principles of evolutionary economics. The nature of novelty and innovation. Evolutionary metaphors and technological change. Gradualism versus punctuated evolution in the history of technology. Case studies in technological evolution.

### **Indicative Reading**

\* Basalla, George (1989) *The Evolution of Technology* (Cambridge: Cambridge University Press).

Degler, Carl N. (1991) *In Search of Human Nature: The Decline and Revival of Darwinism in American Social Thought* (Oxford and New York: Oxford University Press).

\* Hodgson, Geoffrey M. (1993) *Economics and Evolution: Bringing Life Back Into Economics* (Cambridge, UK and Ann Arbor, MI: Polity Press and University of Michigan Press).

Hodgson, Geoffrey M. (ed.) (1995) *Economics and Biology* (Aldershot: Edward Elgar).

Koestler, Arthur (1964) *The Act of Creation* (London: Hutchinson).

Laszlo, Ervin (1987) *Evolution: The Grand Synthesis* (Boston, MA: New Science Library - Shambhala).

Maasen, Sabine, Mendelsohn, Everett and Weingart, Peter (eds) (1995) *Biology as Society, Society as Biology: Metaphors*, *Sociology of the Sciences Yearbook*, **18** (Boston: Kluwer).

McKelvey, Maureen (1996) *Evolutionary Innovation: Early Industrial Uses of Genetic Engineering* (Oxford: Oxford University Press).

Metcalf, J. Stanley (1995) 'Technology Systems and Technology Policy in an Evolutionary Framework', *Cambridge Journal of Economics*, **19**(1), February, pp. 25-46.

\* Mirowski, Philip (1989) *More Heat Than Light: Economics as Social Physics, Physics as Nature's Economics* (Cambridge: Cambridge University Press).

\* Mirowski, Philip (ed.) (1994) *Natural Images in Economic Thought: Markets Read in Tooth and Claw* (Cambridge and New York: Cambridge University Press).

\* Mokyr, Joel (1990) *The Lever of Riches: Technological Creativity and Economic Progress* (Oxford: Oxford University Press).

\* Witt, Ulrich (1991) 'Reflections on the Present State of Evolutionary Economic Theory', in Hodgson, Geoffrey M. and Screpanti, Ernesto (eds) (1991) *Rethinking Economics: Markets, Technology and Economic Evolution* (Aldershot: Edward Elgar), pp. 83-102.

Witt, Ulrich (ed.) (1993) *Evolutionary Economics* (Aldershot: Edward Elgar).

## **T4. Advanced Methodology: Philosophical Issues at the Core of the Social Sciences**

### **Outline Syllabus**

Philosophy in the post-positivist era

Contrasting philosophical perspectives: hermeneutics, post modernism, critical realism

Conceptualising human agency

Causal explanation in the absence of the possibility of experimentation

Abstraction, idealisation and truth in social science

Causal, intentional and evolutionary explanations

The limitations of econometrics and mathematical modelling

Reductionism and emergent properties

Critical realism, institutions and evolutionary economics

### **Lecturers and Tutors**

Geoffrey Hodgson (University of Cambridge, UK); Tony Lawson (University of Cambridge, UK - leader of T4); Philip Mirowski (University of Notre Dame, USA - keynote lecturer).

### **Seminar Topics**

What is the connection between evolutionary economics and critical realism? Why are so many economists opposed to methodology? To what extent are institutionalism, post Keynesianism, Austrianism the same, basically philosophical, project? In what sense must a feminist economics be relativist? Is there a role for econometrics? Can methodology contribute to economics? Explaining inconsistencies between theory and practice in economics. Does epistemological relativism necessitate judgmental relativism? What is transcendental analysis? How alternative is Hayek's subjectivist social science? What are the implications of realist analysis for policy questions? Distinguishing causal and intentional explanation. Emergent properties. The nature of evolutionary explanation. Can functional explanation in economics be defended? What are the pressing tasks for economic methodologists?



### Indicative Reading

- \* Backhouse, Roger E. (ed.) (1994) *New Directions in Economic Methodology* (London: Routledge).
- Bhaskar, Roy (1979) *The Possibility of Naturalism: A Philosophic Critique of the Contemporary Human Sciences* (Brighton: Harvester).
- Bhaskar, Roy (1989) *Reclaiming Reality: A Critical Introduction to Contemporary Philosophy* (London: Verso).
- Boylan, Thomas A. and O’Gorman, Pascal (1995) *Beyond Realism and Rhetoric* (London: Routledge).
- Caldwell, Bruce J. (1982) *Beyond Positivism: Economic Methodology in the Twentieth Century* (London: Allen and Unwin).
- Caldwell, Bruce J. (ed.) (1984) *Appraisal and Criticism In Economics: A Book of Readings* (Boston: Allen and Unwin).
- Cartwright, Nancy (1989) *Natures, Capacities and their Measurement* (Oxford: Oxford University Press).
- \* Collier, Andrew (1994) *Critical Realism: An Introduction to Roy Bhaskar’s Philosophy* (London: Verso).
- Elster, Jon (1983) *Explaining Technical Change* (Cambridge: Cambridge University Press).
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- Jackson, William A. (1995) ‘Naturalism in Economics’, *Journal of Economic Issues*, **29**(3), September, pp. 761-80.
- Lawson, Antony (1985) ‘Uncertainty and Economic Analysis’, *Economic Journal*, **95**(4), December, pp. 909-27.
- Lawson, Antony (1989) ‘Abstraction, Tendencies and Stylised Facts: A Realist Approach to Economic Analysis’, *Cambridge Journal of Economics*, **13**(1), March, pp. 59-78.
- \* Lawson, Antony (1995) ‘A Realist Perspective on Contemporary "Economic Theory"’, *Journal of Economic Issues*, **29**(1), March, pp. 1-32.
- \* Lawson, Antony (1995) ‘The “Lucas Critique”: A Generalisation’, *Cambridge Journal of Economics*, **19**(2), April, pp. 257-76.
- Mäki, Uskali, Gustafsson, Bo and Knudsen, Christian (1993) *Rationality, Institutions and Economic Methodology* (London: Routledge).

<p><b>T5. Technical Change &amp; Employment Growth in Europe: Theoretical Issues and European Policy Perspectives</b></p>
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#### Outline Syllabus

The interrelations of technological change, employment and growth  
The technological long wave and its implications for growth  
The role of institutions in technological change and economic growth  
Explanations of long-run differences in growth rates  
Structural change in Europe: technology and employment  
Unemployment and Inflation in Europe

## Policy implications for Europe

### Lecturers and Tutors

Andrew Tylecote (University of Sheffield, UK - leader of T5); Jan Fagerberg (Norwegian Institute of International Affairs, Oslo).

### Seminar Topics

When does technological change cause unemployment? In what sense does technological change come in waves? What is a technological style and how can the current one be characterised? The institutional factors which affect technological innovation. The institutional factors which affect technological diffusion. How does aggregate demand affect technological change? How are 'functional' changes in institutions produced? What can we learn from econometric studies of (a) long run time series of growth (b) cross-section comparisons of growth rates among countries? How badly is Europe now performing in terms of technological change and economic growth? What is the outlook under current policies? What are the implications of Maastricht and EMU? Is there a case for a change in policy?

### Indicative Reading

- Amin, Ash (ed.) (1994) *Post-Fordism: A Reader* (Oxford: Basil Blackwell).
- \* Amin, Ash and Dietrich, Michael (1991) *Towards a New Europe?: Structural Change in the European Community* (Aldershot: Edward Elgar).
- Fagerberg, Jan, Verspagen, Bart and von Tunzelman, Nick (eds) (1994) *The Dynamics of Technology, Trade and Growth* (Aldershot: Edward Elgar).
- Freeman, Christopher (ed.) (1983) *Long Waves in the World Economy* (London: Butterworth).
- Freeman, Christopher (ed.) (1996) *Long Waves* (Aldershot: Edward Elgar).
- Freeman, Christopher, Clark, J. and Soete, Luc L. G. (1982) *Unemployment and Technical Innovation: A Study of Long Waves in Economic Development* (London: Pinter).
- \* Hodgson, Geoffrey M. (1989) 'Institutional Rigidities and Economic Growth', *Cambridge Journal of Economics*, **13**(1), March, pp. 79-101.
- Michie, Jonathan and Grieve Smith, John (eds) (1994) *Unemployment in Europe* (London: Academic Press).
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- \* Kenworthy, Lane (1995) *In Search of National Economic Success: Balancing Competition and Cooperation* (Thousand Oaks, CA and London: Sage).
- Layard, R., Nickell, S. and Jackman, R. (1994) *The Unemployment Crisis* (Oxford: Oxford University Press).
- Olson, Mancur, Jr. (1982) *The Rise and Decline of Nations* (New Haven: Yale University Press).
- \* Tylecote, Andrew (1992) *Long Waves in the World Economy: The Present Crisis in Historical Perspective* (London: Routledge).
- Wood, Adrian (1994) *North-South Trade, Employment and Inequality: Changing Fortunes in a Skill-Driven World* (Oxford: Clarendon Press).

# Themes Appearing in 1998

## **T6. Economy and Society: Interdisciplinary Perspectives on their Interaction and Interpenetration**

### **Outline Syllabus**

Institutions, organisations, exchange and markets  
Agency and structure: The problem of embeddedness  
Network theory  
Hobbes, Mandeville, Durkheim, and Hayek: the problem of social order  
Non-contractual relations in business  
Capitalism: opportunism versus goodwill

### **Provisional Lecturers and Tutors**

Ronald Dore (London School of Economics, UK); Anthony Giddens (University of Cambridge, UK - keynote lecturer); Mark Granovetter (Stanford University, USA); Klaus Nielsen (Roskilde University Centre, Denmark - leader of T6).

### **Indicative Reading**

- Dore, Ronald (1986) *Flexible Rigidities: Industrial Policy and Structural Adjustment in the Japanese Economy 1970-1980* (Stanford and London: Stanford University Press and Athlone Press).
- Douglas, Mary (1987) *How Institutions Think* (London: Routledge and Kegan Paul).
- Durkheim, Emile (1984) *The Division of Labour in Society* (London: Macmillan).
- Friedland, Roger and Robertson, A. F. (eds) (1990) *Beyond the Marketplace: Rethinking Economy and Society* (New York: Aldine de Gruyter).
- Giddens, Anthony (1984) *The Constitution of Society: Outline of the Theory of Structuration* (Cambridge: Polity Press).
- Granovetter, Mark and Swedberg, Richard (eds) (1992) *The Sociology of Economic Life* (Boulder: Westview Press).
- Hirschman, Albert O. (1970) *Exit, Voice, and Loyalty* (Cambridge, MA: Harvard University Press).
- Hughes, John A., Martin, Peter J., and Sharrock, W. W. (1995) *Understanding Classical Sociology: Marx, Weber, Durkheim* (London: Sage).
- March, James G. and Olsen, Johan P. (1989) *Rediscovering Institutions* (New York: Free Press).
- Marx, Karl (1976) *Capital*, vol. 1 (Harmondsworth: Pelican).
- Polanyi, Karl (1944) *The Great Transformation* (New York: Rinehart).
- Powell, Walter W. and DiMaggio, Paul J. (eds) (1991) *The New Institutionalism in Organizational Analysis* (Chicago and London: University of Chicago Press).
- Smelser, Neil J. and Swedberg, Richard (eds) (1994) *Handbook of Economic Sociology* (Princeton: Princeton University Press).
- Steinmo, S. and Thelen, K. (eds) (1993) *Structuring Politics* (Cambridge University Press).
- Swedberg, Richard (ed.) (1993) *Explorations in Economic Sociology* (New York: Russell Sage).

Swedberg, Richard (ed.) (1996) *Economic Sociology* (Aldershot: Edward Elgar).

Weber, Max (1968) *Economy and Society: An Outline of Interpretative Sociology*, 2 vols (Berkeley: University of California Press).

## **T7. Advanced Theory: Theoretical Frontiers of Institutional and Evolutionary Economics**

### **Outline Syllabus**

Varieties of capitalism and the place of institutional economics

Varieties of institutional economics

The evolution of evolutionary economics and the limits to formalism

Computer simulations and artificial intelligence: prospects and problems

What units and levels of analysis are legitimate?

Towards an operational institutional economics

### **Provisional Lecturers and Tutors**

Giovanni Dosi (University of Rome, Italy - keynote lecturer); Geoffrey Hodgson (University of Cambridge, UK - leader of T7); Tony Lawson (University of Cambridge).

### **Indicative Reading**

Choi, Young Back (1994) *Paradigms and Conventions: Uncertainty, Decision Making, and Entrepreneurship* (Ann Arbor: University of Michigan Press).

Cohen, Jack and Stewart, Ian (1994) *The Collapse of Chaos: Discovering Simplicity in a Complex World* (London and New York: Viking).

Coveney, Peter and Highfield, Roger (1995) *Frontiers of Complexity: The Search for Order in a Complex World* (London: Faber).

England, Richard W. (ed.) (1994) *Evolutionary Concepts in Contemporary Economics* (Ann Arbor: University of Michigan Press).

Gleick, James (1988) *Chaos: Making a New Science* (London: Heinemann).

Hargreaves Heap, Shaun P. (1989) *Rationality in Economics* (Oxford: Basil Blackwell).

Hargreaves Heap, Shaun P. and Varoufakis, Yanis (1995) *Game Theory: A Critical Introduction* (London: Routledge).

Hodgson, Geoffrey M. (ed.) (1993) *The Economics of Institutions* (Aldershot: Edward Elgar).

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Plotkin, Henry (1994) *Darwin Machines and the Nature of Knowledge: Concerning Adaptations, Instinct and the Evolution of Intelligence* (Harmondsworth: Penguin).

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- Stewart, Ian (1989) *Does God Play Dice? The Mathematics of Chaos* (Oxford: Basil Blackwell).
- Vanberg, Viktor J. (1994) *Rules and Choice in Economics* (London: Routledge).
- Vromen, Jack J. (1995) *Economic Evolution: An Enquiry into the Foundations of New Institutional Economics* (London: Routledge).
- Veblen, Thorstein B. (1919) *The Place of Science in Modern Civilisation and Other Essays* (New York: Huebsch). Reprinted 1990 (New Brunswick, NJ: Transaction).
- Waldrop, M. Mitchell (1992) *Complexity: The Emerging Science at the Edge of Order and Chaos* (New York: Simon and Schuster).

<p><b>T8. Industrial Districts, Regions and Globalisation: Theoretical Issues and European Policy Perspectives</b></p>
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**Outline Syllabus**

The changing nature of competition  
 Networks, business culture and technological change  
 The fall and rise of the Marshallian industrial district  
 The globalisation of capitalism  
 Regional economic development in Europe  
 Implications for economic policy in Europe

**Provisional Lecturers and Tutors**

Ash Amin (University of Durham, UK - leader of T8); Klaus Nielsen (Roskilde University Centre, Denmark).

**Indicative Reading**

- Amin, Ash and Thrift, Nigel (eds) (1994) *Globalization, Institutions, and Regional Development in Europe* (Oxford: Oxford University Press).
- Amin, Ash and Tomaney, John (eds) (1995) *Beyond the Myth of European Union* (Routledge).
- Antonelli, Cristiano (1995) *The Economics of Localized Technological Change and Industrial Districts* (Boston: Kluwer).
- Best, Michael H. (1990) *The New Competition: Institutions of Industrial Restructuring* (Polity Press).
- Cantwell, John (1989) *Technological Innovation and Multinational Corporations* (Basil Blackwell).
- Fransman, Martin (1995) 'Is National Technology Policy Obsolete in a Globalised World? The Japanese Response', *Cambridge Journal of Economics*, **19**(1), February, pp. 95-119.
- Grabher, Gernot (ed.) (1993) *The Embedded Firm: On the Socioeconomics of Industrial Networks* (London: Routledge).
- Hirst, Paul Q. and Thompson, Grahame (1996) *Globalization in Question* (Cambridge: Polity Press).
- Michie, Jonathan and Grieve Smith, John (eds) (1995) *Managing the Global Economy* (Oxford: Oxford University Press).
- Ruigrok, Winfried and van Tulder, Rob (1995) *The Logic of International Restructuring* (Routledge).
- Storper, Michael and Walker, Richard (1989) *The Capitalist Imperative* (Oxford: Basil Blackwell).

# The Organising Body

The summer schools are organised by the European Association for Evolutionary Political Economy. EAEPE is an organisation of researchers, university academics and professional social scientists from industry with about 600 members distributed over most European countries.

EAEPE was formed in 1988 and has grown rapidly. The current administrative centre of the association is at the University of Sheffield, UK, under the direction of Professor Andrew Tylecote. The Association has organised several international conferences and seminars in Europe. Its past annual conferences have been held in the following countries:

## Past EAEPE Annual Conferences

Year	Conference Location	Conference Theme	Number of Conference Delegates
1989	Keswick, UK	‘European Economic Integration’	75
1990	Florence, Italy	‘Rethinking Economics: Theory and Policy for Europe in the 21st Century’	125
1991	Vienna, Austria	‘The Evolution of Mixed Economies: East and West’	110
1992	Paris, France	‘Structural Change and the Regulation of Economic Systems: Integration, Disintegration, Globalization’	150
1993	Barcelona, Spain	‘The Economy of the Future: Ecology, Technology, Institutions’	150
1994	Copenhagen, Denmark	‘Challenges to Institutional and Evolutionary Economic Theory: Growth, Uncertainty and Change’	152
1995	Krakow, Poland	‘Transforming Economies and Societies: Towards an Institutional Theory of Economic Change’	155
1996	Antwerp, Belgium	‘Work, Unemployment and Need: Theory, Evidence, Policies’	150

To join EAEPE, to find more information about its conferences, or to receive a sample issue of its twice-yearly *Newsletter*, write to Elaine Davidson, Sheffield University Management School, 9 Mappin Street, Sheffield S1 4DT, UK (e.davidson@sheffield.ac.uk).

The Summer Schools are managed by the EAEPE Summer School Organising Committee. The committee members are currently as follows:

### EAEPE Summer School Organising Committee

Geoff Hodgson (Coordinator)	University of Cambridge	UK
Tony Lawson	University of Cambridge	UK
Klaus Nielsen	Roskilde University	DENMARK
Andrew Tylecote	University of Sheffield	UK

The scientist in charge of the whole Summer School programme is Geoffrey Hodgson of the Judge Institute of Management Studies at the University of Cambridge. He has published widely, including 8 authored academic books, 4 edited or co-edited books, 47 articles in academic journals and 49 articles in books. In addition he has extensive organisational and administrative experience, both in organising academic conferences and seminars and as General Secretary of EAEPE since its foundation in 1988.

Leaders responsible for courses on the 1997 and 1998 summer schools are as follows:

### **Course Leaders**

Course	Year	Course Leader
Foundation	1997, 1998	Geoff Hodgson, University of Cambridge, UK
T3	1997	Geoff Hodgson, University of Cambridge, UK
T4	1997	Tony Lawson, University of Cambridge, UK
T5	1997	Andrew Tylecote, University of Sheffield, UK
T6	1998	Klaus Nielsen, Roskilde University Centre, Denmark
T7	1998	Geoff Hodgson, University of Cambridge, UK
T8	1998	Ash Amin, University of Durham, UK

Persons wishing to join EAEPE, or requiring further information about that association, should contact Elaine Davidson at Sheffield University Management School, 9 Mappin Street, Sheffield, S1 4DT, UK (e.davidson@sheffield.ac.uk).

## Appendix 1: List of EU Less Favoured Regions

For the purposes of the EC TMR Programme, the 'less favoured regions' of the European Union include both the Objective 1 regions and the least densely populated regions of Finland and Sweden (the Objective 6 regions). The list of regions in this category may change from time to time. The following information is taken from the *EC TMR Information Package, Edition 1994-95*.

Applicants to EAEPE Summer Schools with a place of work in a less favoured region should indicate this region in the place provided on the application form.

According to information provided by the EC the 'less favoured regions' are as follows:

<b>Country</b>	<b>EU 'Less Favoured Regions'</b>
Belgium	Hainaut
Germany	Brandenburg, Mecklenburg-Vorpommern, Ost-Berlin, Sachsen, Sachsen-Anhalt, Thüringen
Spain	Andalucia, Asturias, Cantabria, Castilla-Léon, Castilla-La Mancha, Ceuta y Melilla, Comunidad Valenciana, Extremadura, Galicia, Islas Canarias, Murcia
Greece	The entire country
Finland	The 'Maakunta' of Lappi and the three 'Maakunnat' of Kainu, Pohjois-Karjala and Etälä-Savo including some adjacent areas also described as 'Objective 6 Regions' in the Treaty of Accession of 29 August 1994 (OJ No C241/37, p. 354)
France	Départements français d'outre-mer (DOM), Corse, arrondissements d'Avenues, de Douai et de Valenciennes
Ireland	The entire country
Italy	Abruzzi (1996 only), Basilicata, Calabria, Campania, Molise, Puglia, Sardegna, Sicilia
The Netherlands	Flevoland
Portugal	The entire country
Sweden	All 'Objective 6 Regions' of northern Sweden, roughly commensurate with the 'län' of Norrbotten, Västerbotten and Jämtland but with the exclusion of certain districts and the addition of some other adjacent areas. For details see the Treaty of Accession of 29 August 1994 (OJ No C241/37, p. 354)
United Kingdom	Highlands and Islands Enterprise Area, Merseyside, Northern Ireland



## Appendix 2: About Crete



### Getting There

The summer school will be held at the Hotel Panorama, Galatos, near Hania. This is on the Hania-Kastelli coast road, 5km west of Hania town centre, and 18km west of Hania airport.

Crete has airports at Hania and Iraklion. Cheap and regular bus services connect Hania with Iraklion and Rethimnon. The Iraklion to Hania bus takes about 3 hours. There are ferries from Piraeus (near Athens on the Greek mainland) to Hania, Rethimnon and Iraklion. These ferry trips take about 12 hours. There are also ferries direct from Italy.

### Some History

Crete is steeped in ancient mythology. Zeus, the supreme deity, was born and raised on the island. The beautiful goddess Europe - who gave her name to our continent - was kidnapped by Zeus and taken to Crete, where she bore his children. One of them was named Minos, and from this mythological name derives the title of the first civilisation in Europe - the Minoan.

The Minoan civilisation lasted from about 3000 to 1400 BC, and is referred to by Homer in his *Odyssey*. It is believed that the civilisation may have been destroyed by the volcanic eruption of the island of Santorini. Many Minoan archaeological sites remain, including the famous palace of Knossos, just south of Iraklion.

The Romans governed Crete from 67 BC to 395 AD. St Paul arrived in 59 AD, bringing Christianity to the island. When the Roman Empire divided into two, Crete became part of Byzantium. In the ninth century the Saracen Arabs conquered Crete, but it was recaptured by Byzantium in 961. In 1204 Crete was sold for cash to Venice. It remained under Venetian rule for 465 years. Many Venetian buildings remain on the island.

In the seventeenth century the expanding Ottoman Empire set its sights on Crete. The Turks took Hania in 1645 and Rethimnon in 1648. After a siege lasting 21 years, Iraklion fell in 1669. In 1898 Turkey was forced by a coalition of major European powers to give Crete autonomous status within the Ottoman Empire. Union with Greece came about in 1913.

German paratroops landed on Crete on 20 May 1941. It was the first airborne invasion in history. The island fell in just 11 days. The allied armies - British, New Zealand and Australian - evacuated from the southern coast. Crete remained under German rule until 1945.

## Appendix 3: Mountain Walking Expedition

Prior to the summer school, an optional 4-day mountain walking expedition is planned in the White Mountains. There will be a descent of the famous Gorge of Samaria - the longest gorge in Europe.

The expedition will be an ideal opportunity for participants to meet together prior the summer school. However, no financial subsidies are available for this trip. In addition to the equipment required (see below) you will need money for transport and for 3 nights in relatively cheap hotels. The total cost is estimated at about 100 ecu per person.

To join this expedition you must be an experienced mountain walker and be physically fit. No children under 16 are allowed. You will have to carry a rucksack weighing 15kg or more over long distances in rough and remote country. However, no rock climbing nor glacier crossings are involved. The route follows established paths, but these are very steep in places and there will be some exposed heights and some scrambling over rocks.

### Itinerary

Participants will rendezvous at the Hotel Panorama near Hania at 16.00 hrs on Friday 11 July. This will give an opportunity to leave luggage at the hotel prior to the summer school. A minibus will be hired to take the party to the village of Omalos, in the White Mountains at 1060 metres above sea level.

The walkers will stay at a hotel in Omalos for three nights. On the Saturday and Sunday there will be two mountain ascents, one of Gingilos (2080m) and another around Melindaou (2133m). On Monday 14 July they will leave the hotel for the last time and descend the Gorge of Samaria, reaching the sea at the hamlet of Agia Roumeli. An early start will ensure that there is time for a swim.

There is no road out of Agia Roumeli. It is necessary to take the boat eastwards along the coast to Hora Sfakion. From Hora Sfakion there is a bus back to Hania.

### Joining the Walk

If you wish to join the mountain walking expedition then contact Geoff Hodgson at the Judge Institute of Management Studies, University of Cambridge, Trumpington Street, Cambridge CB2 1AG (email: gmh@eng.cam.ac.uk). He will be pleased to advise you concerning equipment, etc..

Please study the following equipment list. If you do not have a pair already, then the boots and socks should be purchased first and worn regularly to soften the leather and harden the feet.

### Equipment Required for Expedition

Unlike the 1996 expedition, we shall not be camping. We shall use cheap hotels instead. The cost will be about 6,000 drachmas per person per night, for three nights.

Given the strong sun and high midday temperatures an early start on each day is necessary. (Hence, unlike the 1996 Picos expedition, post-midnight revelries will be strongly discouraged!) There are substantial risks of heatstroke, sunstroke and dehydration, so we must plan accordingly, and attempt to take to the shade at midday. Many people have died from the summer heat in the White Mountains of Crete. There is as much risk from the impact of the sun above, than from a fall upon a rock below.

*It is a condition of joining the expedition that you bring all the essential items on the following list.* Because of the high temperatures, pay particular attention to the water bottle, sun block lotion,

sunglasses and hat. For instance, the hat should be a light colour, have a substantial peak or brim, but remain secure on the head in a wind. Also, if you have skin that is sensitive to the sun then you should bring long trousers and at least one long-sleeved shirt.

## Essential Equipment

Passport and Money  
Rucksack  
High energy snacks - dried fruit, etc., not chocolate, it will melt!  
Large metal or plastic water bottle: minimum 2 litres  
Water purifying tablets or water purifier  
Compass - essential for safety reasons  
Whistle - to attract attention if you are cut off from the main party  
Torch - essential for safety reasons  
First aid kit - including small scissors and adhesive plasters for feet  
Sun block lotion  
Insect repellent  
Toilet necessities including toilet paper  
Hat - affording protection from sun  
Sunglasses  
Short trousers  
Two shirts  
Set of spare underwear  
Sweater - it can be cold in the mountains at night!  
Socks, plus spare pair  
Rainproof cagoule or anorak  
Walking boots

## Optional Equipment

Swimming costume - for a swim in the sea at the end of the Samaria Gorge  
Long trousers - to cover sensitive skin on legs from excessive exposure to the sun  
Local maps; camera; walking sticks; binoculars; altimeter; etc..

## Some More History - Especially Relevant to the Expedition

In 1866 Crete revolted against Turkish rule. The rebels were defeated throughout much of the island but the area from Omalos to Agia Roumeli remained free for some time. A rebel newspaper - *The Cretan* - was published in the village of Samaria. Attempts to recapture the territory from the north at Omalos and the south at Agia Roumeli were repulsed. This rebel enclave held out until 1869.

Shortly after the German landing on Crete in 20 May 1941, King George II of Greece was evacuated from the island. He and his entourage travelled by mule from Hania up to Omalos, and then down the Samaria Gorge. They were picked up by the British warship *HMS Decoy* and taken to Egypt.

Although the Germans attempted to gain control of airfields at Maleme (16 km to the west of Hania), Rethimnon and Iraklion. They were initially defeated at all but Maleme. An allied counter attack on Maleme failed. After landing several aircraft under allied fire, the balance of the battle went in favour of the invaders. On 25 May there was a noted battle at Galatos (near the present day Hotel Panorama). The village was briefly recaptured by New Zealanders from the advancing German army.

Two days later the allied forces were ordered to evacuate the island. Many trudged south over the mountains along the road to Hora Sfakion. On the last three nights in May, British warships took off several thousand allied soldiers from the beach. On 1 June the evacuation was abandoned, leaving 5,000 troops behind. Most of these became prisoners of war. A few attempted to find boats and escape - some with success. Others joined Cretan resistance fighters in the mountains.

In 1962 the Samaria Gorge was declared a national park. According to that legislation, the historic village of Samaria was evacuated and abandoned to nature and to the tourists.

