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Professor Jolanta Supińska: obituary (1 March 1944 – 31 January 2022)

Who a social politician should be: *In my opinion, it should be a person of opposition, a person of rebellion, who can look critically at the existing reality. Their scientific and life knowledge should help them in turn in this meaningful rebellion. And yet it is necessary to have an axiology that is beneficial to the maximum number of entities that surround them,* quoted after: Interview with Professor Jolanta Supińska in the book *Portrety w polityce społecznej* (Grewiński & Karwacki, 2019).

Professor Jolanta Supińska, Jola, was a special person. We remember her as kind-hearted, curious about the world and sensitive to the harm of people and animals. A person who rebelled and wanted to change the world to make it better and fairer. We remember her as a scholar who tackled the most difficult subjects in social policy, namely, its entanglement in disputes between the most important values of social life.

We are grateful to you, Jola, for your contribution to the creation of social policy science at the University of Warsaw. For the cult book *Dylematy polityki społecznej* (Dilemmas of Social Policy), which has set new perspectives for the discussion of this area of science and practice. When I looked through this book in 2014 to write the introduction to the new edition, I was again impressed by how many of the issues covered there were later developed in global theory and practice, e.g., behavioural social policy.

We bid farewell to a beautiful person and a great scholar. We will remember you, Jola, and your legacy in our lives and work.

Jolanta Supińska graduated in economics at the University of Warsaw in 1966. She has written her master's thesis on wage policy and wage inequalities at the seminar by Professor Zofia Morecka. She defended her doctoral dissertation entitled "Yugoslavian socio-economic strategy and the diversity of living conditions of the nations of Yugoslavia" in 1974. Its supervisor was Professor Jan Danecki, one of the co-founders of the Institute of Social Policy at the University of Warsaw. She obtained her post-doctoral degree on the basis of her dissertation *Dylematy polityki społecznej* (Dilemmas of Social Policy) defended in 1989, and the title of full professor was conferred on her in 2015. Six doctoral theses have been defended under her supervision.

The postdoctoral dissertation was published in 1991 and was a landmark work in the sense that it was conceived and completed at a time when the system of real socialism was collapsing, and was published when the rapid construction of a new

system had begun. It was also ground-breaking in addressing the most important issues of social policy from an axiological and instrumental perspective. It thus combined the value-based approach typical of political philosophy with the orientation towards instruments for changing human behaviour characteristic of social policy science. The dilemmas formulated in the book were skilfully defused and resolved in moderate and realistic positions that together provided a solid basis for building a humanist social order.

Among her many positions, it should be mentioned that she was a member of the Presidium of the Committee on Labour and Social Policy of the Polish Academy of Sciences, President of the Social Council to the Prime Minister, a member of the Consultative and Programme Council to the Government Plenipotentiary for Equal Status of Women and Men, editor-in-chief of the scientific journal *Social Policy Issues. Studies and Discussions*, and a member of the Editorial Board of the Library of the Social Worker publishing series.

She also took an active part in political life as a member of the Labour Union (she ran for the European Parliament in 2009 from the Democratic Left Alliance's list), and in elections to the Warsaw City Council (she ran from the list of Jan Śpiewak's "Wygra Warszawa" electoral committee). She was a vegetarian and a supporter of the Green Party and took part in many animal rights campaigns.

On behalf of the editorial team,
Ryszard Szarfenberg

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Housing and Settlement. Research Conducted by Professor Jolanta Supińska (1944–2022)

Abstract

The article attempts to analyse and synthesise the achievements of Professor Jolanta Supińska related to housing and settlement. They are related to her multifaceted research on social policy aspiring to improve the existing reality. This attempt is based on the method of research procedure consisting of a review of relevant publications authored or co-authored by Jolanta Supińska. The article aims to prove that these housing and settlement achievements belonging to the humanistic approach to housing research developed after 1989 at the Institute of Social Policy at the University of Warsaw also place Jolanta Supińska in the trend of the Polish School of housing and settlement issues. They form a logical sequence convergent with the development of the thought of this school, going far beyond the Polish issues. The subjects of Jolanta Supińska's works range from housing and social issues to housing and settlement problems to dealing with the flawed paradigm of market economic growth and, consequently, the entire development of civilisation. Thus, these subjects reflect universal values. The analysis and synthesis also indicate that Jolanta Supińska's works devoted to housing and settlement issues enrich the subject of social policy with a comprehensive spatial approach related to demographic issues. They help to better describe the relationships between social policy and housing and settlement issues as well as

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their significance in the development of civilisation. They reveal the potential and related social policy challenges resulting from the desired process of balancing the space of human habitation on Earth based on the concept of sustainable development.

Keywords: Professor Jolanta Supińska (1944–2022), social policy, housing and settlement achievements

Introduction

This study does not really aspire to discuss the multifaceted research works of Professor Jolanta Supińska in the field of social policy, and more broadly, the science of social policy, the work whose determinant is the synthesis of the issues of this policy theory (Supińska, 2014) as well as its contemporary dilemmas (Supińska, 2013a). Her work reveals the knowledge as well as the spirit of Professor Supińska – a vegetarian, defender of animals, not only people. The work is so enriching – it is worth quoting these words here – “[...] humanistic traditions of the *Polish School of social policy*, considering working out social transformations to be the subject of this academic discipline” (Supińska, 2013a, p. 9). Thus, the work assuming the active approach of a researcher trying to improve the existing reality. Jolanta Supińska defined social policy very broadly: “[...]social policy is a *point of view, a way of viewing and axiological evaluation* of the whole world, not only the human world” (Supińska, 2013a, p. 9), adding, “This chosen point of view, inherent in social policy – scientifically and morally justified – makes it possible to distinguish *between antisocial and prosocial* states and actions” (Supińska, 2013a, p. 16.). Writing about the axiological dimension of social policy, Jolanta Supińska stated:

The indication of values to be pursued does not mean that utopian hopes are spreading, that these values will be realised immediately and fully. By expressing the intention to pursue policies that enable people to live healthier and longer lives, we are not promising immortality; it may be regarded good as it cannot be any better. And by pursuing policies that alleviate the most blatant inequalities disorganising the society, we are not going to come to a mechanical uravnilovka. The goal is the direction of movement, not the finish line, the vanishing point (Supińska, 2013a, p. 19).

Leaving the responsibility to appraise and to due celebrate the outstanding achievements of Jolanta Supińska to others, the author of this article attempts to synthesise housing and settlement achievements so characteristic of the comprehensive reasoning of the Professor. These accomplishments, which place Jolanta Supińska in the trend of the Polish School related to this issue, begun to form in the first years of the interwar period (Cesarski, 2013). They exemplify a disappearing art of capturing and interpreting scientific views in the language of humanities referring to universal values.

Jolanta Supińska’s close cooperation with Witold Nieciński, one of the leading representatives of this Polish School, which bore fruit in the years of transformation, marks the beginnings of the Professor’s housing studies, which then entered the area

of settlement. Witold Nieciński, working from 1954 at the Institute of Housing Construction, in 1968 renamed into the Institute of Housing Management (Pol. Instytut Gospodarki Mieszkaniowej, IGM), in 1977, began his activity at Jolanta Supińska's home Institute of Social Policy at the University of Warsaw (IPS UW). In the years of transformation, IPS UW developed a humanistic approach to housing research, with Jolanta Supińska's work having a significant impact on it (Zubrzycka-Czarnecka, 2017, p. 40–45). However, Jolanta Supińska's interest in the housing issues began much earlier than her first publications on them. It is reflected in the words: "My fascination with housing began in the 1970s when I read expert opinions vividly written by Witold Nieciński and Tadeusz Źarski (researchers at the IGM then) for the Committee 'Poland 2000'" (Supińska, 2005, p. 9). Adam Andrzejewski was first a formal, then informal steersman of the IBM and IGM for half a century till his death in 1998. He was the most prominent post-war representative of the Polish School of housing and settlement issues (Stasiak & Cesarski, 2001), whose works Jolanta Supińska refers to, marking her belonging to the environment of this school, also on other occasions (Supińska, 2013b).

The aim of the present retrospective and analytical study is to outline the housing and settlement dimension of Professor Jolanta Supińska's work with its phases, evolution as well as the message and universal values. The applied method of research consists in a review of relevant publications authored and co-authored by Jolanta Supińska. The article is also to prove the author's belief that the housing and settlement interests of Professor Jolanta Supińska are arranged in a logical sequence convergent with the development of the thought of the Polish School of research on these issues as well as practice in this field.

Housing and social issues

In Poland, in the first years of the systemic transformation, there was a growing social, frequently tragic, problem of repayment of housing loans taken out by cooperatives, burdening cooperative members in the period of hyperinflation and then double-digit inflation. A critical reaction to this is presented in the article by Jolanta Supińska in "Sprawy Mieszkaniowe", a quarterly published by the IBM and IGM in the period 1963–2002. In the article, Jolanta Supińska emphasises the socio-economic diversity of households occupying cooperative apartments in the years 1990–1992. She pointed to wealthy and very affluent households supported by publicly funded bank discounts, taking over cooperative premises at market rates from those resigning from the settlement for financial reasons. However, she focused on the largest group of households, for which an extreme financial effort was, as a rule, the only chance for an independent flat, i.e., its acquisition and maintenance excessively overloaded with loan repayment. The information about a possible amount of this repayment was not given – as she indicated – in a reliable manner to those deciding to settle in cooperative premises. Jolanta Supińska emphasised no connection between the amount of housing loans granted by the banks in the years 1990–1992 for specific construction tasks with the level of income of future residents as well as the instability

of repayment rules, including the so-called double indexation of unpaid interest. She considered the attempts of the state to protect the current income of this group of co-operative members to be decisively insufficient. Jolanta Supińska did not stop at criticism. She proposed to improve the way housing construction was credited, which did not arouse any interest of decision-makers, in the form of three groups of different solutions concerning: the existing debt, the growth of the “credit loop” in the future and the regulation of the current burden on household budgets due to loan servicing (Supińska, 1992).

The general housing crisis in Poland did not stop. The countermeasures proposed by the housing research community, including Jolanta Supińska, in the early 1990s were not understood by the government. The state did not create economic, systemic and technical or material conditions to facilitate building or renting a place to live by its citizens. It does not intervene sufficiently when housing remains inaccessible or hardly accessible for medium- and less affluent groups of the population. It does not counteract housing pathologies born in the People’s Republic of Poland and at the beginning of the transformation. Jolanta Supińska and other housing researchers emphasised that there were gaps and inconsistencies in the New Housing Deal (Pol. *Nowy ład mieszkaniowy*, NŁM) of 1993. Referring to the social doctrine of the market economy, the NŁM did not consider that such an economy is based on a conscious creation of social consumption funds. It ignored the need for the inclusion of non-market social issues in the housing policy, correcting the operation of market mechanisms in this area (Grudziński et al., 1992; Supińska, 1993; Nieciński et al., 1993). These issues determined the way Jolanta Supińska perceived the entire housing problem in Poland, consistent with the position of the Polish School of research in this area, already expressed in the interwar period (Supińska, 1996; Supińska, 1998).

The liberalisation of market forces resulted in far-reaching changes in the forms of ownership, including the housing resources. The privatisation of housing in the public sector was expanding and accelerating significantly. The mistakes in the housing policy were described in a cautionary article written by Jolanta Supińska and Witold Nieciński at the beginning of the second decade of transformation. In particular, it was advisable to reject the extreme doctrine of liberalism, which absolutises the role of the market mechanism in satisfying housing needs, “silencing” the housing aspirations of the majority of society and creating greater social dangers in the future than a unilateral sense of entitlement in this area (Nieciński & Supińska, 2000).

Jolanta Supińska participated in a discussion initiated in this period by the editors of the monthly “*Domy Spółdzielcze*”, which has been published since 1957. She stressed there the need for the public authorities to support housing initiatives of a different kind. She gave priority to cooperatives, especially tenancy cooperatives, as worthy of the most consistent support due to the construction and maintenance of a moderate standard housing resources, the mobilisation of resources of the middle-income population and the ability to create a social bond that goes beyond the borders of residential areas. She indicated a characteristic predisposition of cooperative property to give the inhabited space a community character taking into account the privacy of the accommodation microspace. She outlined a broad vision of intergenerational transfer of cooperative property – tenancy and other property, which, contrary to

popular opinion, is conducive to permanent inhabitation, also through the consolidation of the entire cooperative movement. However, she warned against the tolerance for legal and administrative pathologies within housing cooperatives before and after 1989, and external regulations limiting the possibilities of its development (Supińska, 2001, p. 3).

In 2002, Jolanta Supińska took part in a discussion on the problems of housing in Poland published in the scientific journal “Problemy Polityki Społecznej. Studia i Dyskusje”, of which she was the editor-in-chief between 2006 and 2012. She brought out issues that were increasingly neglected in the years of transformation. She pointed to the unclear status of a flat having some features of public and private goods. In this connection, she stated: “This is a physical character of housing – spatial community [...]. Even if individual people have property titles to certain bricks of this structure, it is considered a public good as a whole, requiring the care and responsibility of public entities” (Supińska, 2002, p. 222). Jolanta Supińska then returned to obvious advantages of group ownership in this context, focusing on cooperative ownership, mentioning here also the communal property understood, one can add, in the traditional sense derived from the interwar period postulated by prominent representatives of the “Polish Housing School” at that time. With regard to group property, she said:

It is, therefore, necessary to laboriously organise the law and to practice such a “social pedagogy” in order to make people aware that the community, firstly, results from the physical nature of habitat that cannot be shredded and, secondly, such an arrangement can be socially and economically beneficial for them. In this way, perhaps it would be possible to gradually restore this positive bottom-up attitude towards cooperatives (Supińska, 2002, p. 222).

It is Jolanta Supińska, in her collective work for the 90th birthday anniversary of Witold Nieciński, who was the first in Poland to warn against the shortcomings of social policy that treats housing policy perfunctorily, disregarding the housing conditions of the population. She put forward and proved the thesis that the evolution of housing policy, considered today an independent scientific discipline, justified talking about the place of housing policy in the social policy and about the place of social policy in the housing policy. She said, “[...] where there is a beginning of investment in walls and transformation of physical space, the social policy appears powerless and incompetent. Conversely, the housing policy can be desocialised and conducted in an excessively technocratic way” (Supińska, 2005, p. 13). She supported an in-depth, multifaceted analysis of the relationship between unmet housing needs and a variety of socio-economic perturbations and irregularities. Jolanta Supińska recalled the beginning of the 1990s when central authorities stated that the lack of housing policy was the best policy, housing was a market commodity, etc. In Poland, the transformation of housing, subordinated in practice to the principles of neoliberalism, gave – as she aptly observed – an impression of abundance. As part of this abundance, despite the introduction – along with attempts to make rents more realistic on the market – of housing allowances which, to a substantial extent, did not reach those in the worst need, the implementation of evictions became increasingly frequent.

Giving examples of expensive “investments in man” increasing the chances of commercial participation in the labour, cultural and other markets, Jolanta Supińska pointed to even more expensive housing, not recognised as a public good in contrast to many commercial expenses. This led Jolanta Supińska to the conclusion that the housing policy is an important, but a significantly different area of research and practical activities from the “rest of social policies”. Therefore, the housing policy should combine the elements of the administrative-subvention model with the challenges of the accumulation-intervention model, both, as she remarked, were proposed by Adam Andrzejewski in the 1970s (Supińska, 2005).

At the beginning of the 2010s, in a text summarising housing paradoxes in Poland, Jolanta Supińska began, together with Łukasz Szewczyk (Supińska & Szewczyk, 2009), with the thesis put forward by Adam Andrzejewski that housing was the most expensive good of common use. She mentioned the features of a flat indicated by Adam Andrzejewski which hinder its spread in the social dimension: immobility, i.e., attachment to the place where it was built, the longevity of use reaching 80–120 years in the Polish conditions, low degree of adaptation to the changing needs of residents, susceptibility to moral wear and tear processes and an excessive cost of construction and maintenance. Against this background, Jolanta Supińska and Łukasz Szewczyk formulated the first paradox saying that the housing issue in Poland, which had not been solved for decades, was “permanent evil”. They indicated the second paradox, because the features like durability, low degree of adaptability to changing needs, immobility as well as the excessive costs of housing interfere with the rapidly growing mobility of the Polish society in the post-war period and the related changes in the size and structure of households, lifestyle and cultural conditions, etc. The third paradox consists in the transformation of the needs and possibilities of saving for the acquisition and maintenance of a flat becoming a science-intensive and import-intensive good, in view of difficulties of systematic earning associated with unemployment and what is called the flexible forms of employment. This is in favour – despite the market focus on individual ownership and commercial rental – of the growing importance of social renting. The fourth paradox connected with this arises from the need for a multiplicity of ways of obtaining a flat, forms of its ownership and types of flats with increasing financial, property and social inequalities of the population. The fifth paradox is marked by the aforementioned double role of a flat as an intimate oasis of privacy and, at the same time, a public good. The housing misery, neighbourhood of slums, aggression and mutual misunderstanding caused by overcrowded premises and isolation of various communities, and suppression of creativity have a clearly supra-individual dimension.

Jolanta Supińska and Łukasz Szewczyk considered the question: “How much politics is there in the housing policy?” rhetorical. They claimed that the true policy is substituted by detached and superficial actions subordinated to the minimisation of budget deficits, without any bolder attempts to counteract, with the policy, a narrow demographic reproduction giving rise to many other socio-economic problems. A detailed inquiry, according to them, was: “How much social policy is there in the housing policy?”. Jolanta Supińska and Łukasz Szewczyk also answered the query of how much housing policy there is in the social policy. They argued that

social politicians focused mainly on providing benefits to the poor, offering educational and medical services, etc. However, it is difficult, as they pointed out, to develop a basket of basic goods and services and a minimum income without any knowledge of the diverse, generally relatively high costs of broadly understood housing investments (Supińska & Szewczyk, 2009).

Housing and settlement issues

Jolanta Supińska shows her comprehensive housing and settlement approach in another question she formulated together with Łukasz Szewczyk. She extended the list of housing paradoxes in Poland asking how much spatial policy there is in the housing and social policy (Supińska & Szewczyk, 2009). Jolanta Supińska and Łukasz Szewczyk referred there to the idea of environment developed by the “Polish Housing School” stating that flats should be built to create harmonious and functional human settlements that constitute a basic determinant of spatial order. The extended function of flats with micro-local, local and supra-local communal and social infrastructure facilities is primarily intended to enrich a wider settlement standard. The authors considered it highly insufficient to identify spatial order with the aesthetic approach of architects, which has little to do with housing policy. They referred to historical examples of the perception of close relationships between spatial and housing policy in the 15th century through the concept of the city-garden created by Ebenezer Howard, a specifically understood deurbanisation by Le Corbusier, the Bauhaus times – admittedly, discovered again today by the EU Athens Charter, for the contemporary search for the urban cohesion. Jolanta Supińska and Łukasz Szewczyk underlined the connection, common for this and other concepts, of housing thinking with the spatial dimension, going beyond the provision of flats understood in the purely constructional sense as only a “roof over one’s head”. They deplored the current simple devaluation resulting from “colloquial knowledge” of many creative postulates of such thinking, mistakenly reduced in Poland to the principles of the post-war system. They also deplored the heritage of modernism in this respect, so easily rejected in Poland, “probably as nowhere else in the world”.

In Jolanta Supińska’s reasoning, space is the area in which the life of communities takes place. Permanent spatial development, and especially buildings, is “a foundry form modelling the majority of human behaviours” (Supińska, 2013a, p. 139). Habitat, i.e., the territory occupied by people, is also a socio-geographical space created over generations. Jolanta Supińska stated in this regard: “It is impossible to conduct a rational housing policy with reference to one research discipline” (Supińska, 2013a, p. 139). She pointed to urban planning as proposing the development of a settlement network on the national, regional and city scale; the spatial development policy and regional policy, which are particularly important areas defining the scope of habitat; architecture filling the structure of the habitat with projects of settlements, buildings, etc. She perceived the sociology of town, countryside and housing as dealing with the functioning of human centres in space of various scales, and, on the other hand, she saw the importance of the branches of law regulating the processes of creating

and using a habitat, including the protection and revalorisation of the natural environment transformed by human civilisation. Jolanta Supińska went even further to the ecological determinants of the settlement and inhabitation of man on Earth, pointing – as a defender of equality of animals in this aspect – to the importance of ethology and proxemics determining the biological and cultural aspects of the human sense of territoriality (Supińska, 2013a).

In the conditions of the intensifying structural crisis of capitalism of the second decade of the 21st century, Jolanta Supińska indicated the exhaustion of the neoliberal model of economic sciences and management, which began to intensify a general anthropopressure in the 1980s. She stated:

Economists are increasingly talking about the collapse of a certain model of economic science and real management revealed on this occasion; a model called neoliberal, which for about 20 years supplanted the impact of Keynesianism (not to mention Marxism) from the “popular economic wisdom”. The paradigms of these trends of thought reach their apogee, wear out, go away, and then come back “as new ones” (Supińska, 2013a, p. 67).

In this context, she brought together the discussions on the greenhouse effect of “dirty production and consumption” and the multi-culture of postmodern society reinforced by excessive settlement migrations born of global socio-economic inequalities throughout the living space. In a masterly, concise way, she defined migration dilemmas by saying [...] *a surge of global prosperity lifts some boats faster, while others quickly soak up water and can go to the bottom*”. (Supińska, 2013a, p. 84). Jolanta Supińska also stated: “[...] considerable discrepancies in countries with a low level of development are particularly prone to conflicts. The local social order can hardly be *sustainable*, and emigration from it serves as a safety valve” (Supińska, 2013a, p. 85). Thus, she supported the need for broader approaches to the relationship between man, economy and nature in favour of sustainable development, i.e., sustainable human habitation on Earth. Jolanta Supińska saw opportunities to make this development real in the supranational policy in this area.

Jolanta Supińska was convinced that “sustainable development is difficult to implement in the conditions of a population boom” (Supińska, 2013a, p. 109), and that “[...] the ecological objectives are not achieved through population growth, *but through population stabilisation and even decline*” (Supińska, 2013a, p. 109). She did not expect “[...] a quick and decisive departure from the current philosophy of development [...]” (Supińska, 2013a, p. 109); the philosophy of development, it can be inferred, generating global and other socio-economic inequalities so conducive to a population boom, including a migration crisis undermining the desired root taking of living. The philosophy responsible for this global anthropopressure in a situation when: “Modern civilisation is slowly [insufficiently M.C.] moving away from the axiom that man is the unpunished master of the Earth and nature” (Supińska, 2013a, p. 106).

Of the ideas cited by Jolanta Supińska, which treat population development from the perspective of common values: autotelic, religious, political-military, economic, cultural and ecological, today, the ecological challenges seem to be reaching furthest into

the future, determining the sustainable human habitation on Earth the most strongly. The threats to the ecological values were interpreted by Jolanta Supińska in the aspect of three ecological goals of increasing complexity. She moved from the immediate, pragmatic goal, i.e., the preservation of human security and survival, to the goal enriched with positive human aesthetic and emotional experiences, to the aim of treating nature as a superior value, leading to the recognition that man is only a part of nature. But the only part capable of self-limiting in the name of the survival of the whole, i.e., the Earth. Perhaps, then, the duration of human habitation on Earth depends on their ability to limit themselves quantitatively?

Jolanta Supińska formulated and considered a “counter-quantitative” approach the most accurate for social policy trying to repair the existing reality, accepting as a general goal an increase in the broadly understood freedom to develop one’s own household, including the human right to produce offspring or not, which should not be subject to moral assessments. Eventually, the effect and resultant of such a law may change the population numbers on a macrosocial scale, analysed without axiological assumptions and forecast on the basis of retrospective data so as to strive in the future for “good conditions for births, reproduction, life and death” (Supińska, 2013a, p. 134). Therefore, the present needs and standards of life of a free man come first and may be modified, “[...] when such a necessity arises from the prediction of the future needs of children and future generations” (Supińska, 2013a, p. 134). Jolanta Supińska also refers to the fact-verified theory of demographic transformation – a centuries-long process of transition from a large number of births and deaths, rapid generational renewal, etc. to a type of reproduction with opposite features typical of the countries with the highest level of GDP today. According to today’s state of knowledge, the inevitability of this process leading to “economical and rational” reproduction of the native population, strengthened by the empirically recorded, fading amplitude of baby declines and booms, speaks in favour of a self-driven secular mechanism of reaching the balance, equivalent to achieving the state of social well-being (Supińska, 2013a, pp. 134–135).

Jolanta Supińska’s reasoning as a social policy researcher resulting from the presented population arguments turns out to be critically important and inspiring in the housing and settlement dimension. And perhaps the “economical and rational” reproduction of population is synonymous with “economical and rational” inhabitation? Can the search for a synthesis of ecological self-limitation of man, a “counter-quantitative” approach to demographic objectives and a self-driven mechanism of demographic balance recovery serve a broadly understood root taking of inhabitation, which is a prerequisite for a pro-settlement oriented sustainable development? These questions, no matter how scientifically tempting, potentially elevating the profile of supranational, global housing and settlement policy, remain without a generally accepted answer today.

A broader housing and settlement significance is due to a study by Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka created after 10 years of Polish membership in the European Union (Supińska & Zubrzycka-Czarnecka, 2015). Considering flats and the surrounding habitat, Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka made an innovative presentation of five – as they call them – paths of development of housing in Poland. These paths are marked by the impact exerted by international

institutions, the achievements of the Polish School of housing research, ownership policy, changes in the state of the housing resources and the impact of institutions and funds related to the housing policy. The theoretical perspective of the study is determined – as the Authors point out – by the tradition of the Polish School of housing research. According to this tradition, spatial arrangements and buildings that survived the passage of time and different events are carriers of ancient cultures and social relations, so they need to be analysed in the long-term dating back to the end of World War II in this case.

Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka considered the assumptions of the Polish School of theory and practice of the housing policy consistent. In these assumptions, they emphasised the intervention of public institutions in housing in order to support the satisfaction of the needs of low-income populations. They mentioned the idea of a social housing estate, related mainly to the pre-war achievements of this school, combining architectural, urban and political-social postulates with the need for functional modernist housing architecture. This idea was implemented on an experimental micro-scale of settlement by Warsaw Housing Cooperative (Pol. *Warszawska Spółdzielnia Mieszkaniowa*) building housing estates conceived in the future as basic residential units of the functional and spatial structure of the city. Housing estates in which basic social and municipal infrastructure is a prerequisite for the integration of residents.

Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka claimed that after 1989 there was some reluctance of the political authorities in Poland not only towards housing cooperatives, but also communal and company housing as part of the withdrawal from interventionism in satisfying housing needs. They pointed to the wasted opportunities of the European Union's influence on the development of housing in Poland by including housing policy as part of the urban policy as well as the overall strategy of social inclusion. In the area of changes in the ownership structure, the authors noted some worrying phenomena accompanying the purchase of flats in Poland; e.g., household debts due to housing loans and limited mobility in the labour market. They criticised the growing importance of private housing property as a result of the reprivatisation of urban real estate existing so far as communal flats in old tenement houses with tenants persecuted by new owners later or the reprivatisation of public spaces developed as parks, school playgrounds, etc. They underlined that documentation confirming the title to property can be unreliable and unverified. They treated ownership transformations as a determinant of the transformation of inhabited space. With regard to the path of changes in the housing resources, Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka noted that in the field of housing, the unreliability of the shortage economy manifested by the long waiting time for accommodation in the public sector was not overcome in Poland by the market economy. In addition, the shortage of decent housing is accompanied by vacant property, and the increase in population mobility and inherited housing distribution emphasise this paradox. Vacant property exists both in depopulated villages as well as in metropolises. It is to a substantial extent related to the migration movements of the population in search of work, including periodic emigration to the EU countries. In addition, the law does not limit citizens in terms of the number of flats owned, which before

1989 effectively counteracted multi-flat ownership in Poland contrasted with homelessness in the years of transformation.

The European integration did not stop the destabilisation of the institutional infrastructure of housing policy. Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka gave an example of eight changes in the structure of ministries and central offices responsible for the housing policy after 1989 and an example of the liquidation of many public housing institutions, including the IGM in 2002 and the National Housing Fund operating only in the period 1995–2009. Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka pointed out that letting the housing policies remain within the competence of the EU member states results in a number of unrelated, often inconsistent areas of impact of EU institutions on housing. In the field of housing and settlement issues, this impact primarily concerns the spatial relations of migration and the distribution of housing resources. Polish migrants to the EU countries looking for jobs are exposed, e.g., to living in substandard conditions, which should be regulated in the field of international housing and settlement policy.

It is worth quoting here some statements of Jolanta Supińska from a slightly earlier work:

The location of real estate, i.e., flats, is easy to determine, the condition is also easy to diagnose and substandard housing, e.g., slums, easy to distinguish. But even migrants themselves may be unsure where they really are: here or there. And where they will eventually settle down. The European labour market is a shock absorber that allows us to camouflage Polish unemployment, but also Polish homelessness (Supińska, 2013a, p. 139).

In this context, a question arises – how to count the shortage of housing and its standard in relation to the number and structure of households and their distribution? The answer is not simple. Jolanta Supińska argued that only non-substandard and non-decapitalised flats should be included in this calculation, which is subject to change, though. In addition, non-residential premises are sometimes inhabited, and the existence of vacant property indicates a mismatch between the spatial structure of the housing resources and the labour market. The law allows wealthy people to buy flats solely for the purpose of hoarding. Jolanta Supińska noted the disappearance of mechanisms adjusting the usable area of flats to the size of households, as a result of which the smallest flats are often occupied by poor large households with many children. It raises a reasonable doubt that even if about two million missing flats, according to various changing estimates, were to be built in Poland, their defective distribution through market mechanisms may not cause a significant effect on the social dimension. These and other factors mean that, “Culture and society determine the human team (from single/multi-person, single/multi-generational household to the neighbourly community) and the cultural or spatial environment in which we want these needs to be met. The economy and politics exaggerate the possibilities of spreading rational standards and realising desires” (Supińska, 2013a, p. 138).

In Poland, however, the intensification of migration in search of employment has not triggered the need to create sufficient instruments to support the construction

of flats for rent, making the labour market more flexible than the ownership of houses and flats, which is far less susceptible to cyclical fluctuations in the labour and housing markets. Negative phenomena and housing as well as settlement processes, which come as a consequence of the liberal market economy suddenly introduced in Poland, according to Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka consist in the appropriation of public space together with the immediate surroundings of flats for private purposes. They manifest themselves in a chaotic and often illegal placement of large-format advertisements in cities, the occupation of housing estate greenery by diverse types of proprietary housing construction, and suburban greenery, including forest greenery, by private gated estates for the rich (Supińska & Zubrzycka-Czarnecka, 2015).

In conclusion, Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka emphasise that the accession of Poland to the EU did not initiate the revival of housing for sustainable living. The authorities rejected the idea of the Polish housing school, including the traditions of housing cooperatives together with the concept of a social housing estate. With regard to the institutional infrastructure of housing policy, the undeniable achievements of many interwar and post-war institutions were lost. At the same time, no new concepts of housing policy have been developed, not only concerning housing, but also the surrounding habitat. Jolanta Supińska and Aleksandra Zubrzycka-Czarnecka concluded that the condition of Polish housing will constitute a significant obstacle to the participation of Poland in the process of European integration.

Conclusion

The analysis and synthesis of Professor Jolanta Supińska's housing and settlement achievements, the phases and evolution of this *acquis*, reflect explicit universal values that go beyond the Polish issues. They reflect the values guiding the thought of the Polish School of research on these issues since the 1920s. The achievements of housing cooperatives in the development of this school cannot be overestimated. Jolanta Supińska stated, "the Polish achievements of housing cooperatives are among our best traditions, the recall of which should be the task of the historical policy currently being discussed" (Supińska, 2013a, p. 141). The subject matter of Jolanta Supińska's works expanded in a manner characteristic of the Polish School – from housing and social issues to housing and settlement issues to dealing with the flawed market paradigm, especially neoliberal as well as the economic growth and, consequently, the entire civilisational development. Jolanta Supińska confirmed with all her research work on housing and settlement that contemporary civilisational challenges are increasingly divergent from the individual market-based needs, which really turned to desires. The growing discrepancy of this kind relates to a departure from linking a broadly understood existential security of humanity with the content and forms of social housing, settlement and habitation. Housing and settlement satisfying the needs of poor and moderately well-off populations should be one of the basic instruments of urban planning and urbanisation policy leading to the balanced development of cities and other inhabited spaces. Social housing and settlement provide an opportunity to

influence the proper functional-spatial relations of housing, social and other infrastructure, workplaces, recreation areas, etc. Opportunities in this area have not been used so far, not only in Poland.

Jolanta Supińska's research works on housing and settlement enriched the subject of social policy with an extensive spatial approach related to demographic issues. They revealed the potential and related social policy challenges resulting from the desired process of balancing the space of human habitation on Earth based on the concept of sustainable development. Jolanta Supińska justified that greater consideration of the spatial and population dimension allows for a better emphasis on relations between social policy and housing and settlement issues and their importance in the development of civilisation. The message of her housing and settlement achievements shows theoretical and practical possibilities of giving social policy new, logically acceptable, systemic and universally understandable mega social contents related to habitation. This message gives Professor Supińska a permanent place in the history of Polish housing and settlement thought. Her comprehensive reasoning, which made such an important contribution to the cause of housing and settlement, reveals her unique understanding of social policy and an outstanding, hardly replaceable contribution to the Polish School of social policy, to which she remained faithful to the end.

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Welfare State Agenda of Successful Populist Parties in Czechia and Slovakia

Abstract

Several studies suggest that the welfare state agenda, which has traditionally been a crucial issue for left-wing populist parties (LWP), has become important for all kinds of populist parties: centrist-populist (CP) as well as right-wing populist (RWP). In this paper, we examine the role of the welfare state agenda in the election programmes of the Czech and Slovak populist parties that either won the elections in 2017 in the Czech Republic and 2020 in Slovakia (this was the case for CP parties in both countries) or they won representation in Parliament in these elections (this was the case of RWP

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parties). The findings show that the welfare state agendas of CP and RWP parties regarding the pattern of welfare state objectives and deservingness criteria applied in their policy proposals do not differ so much in some respects. At the same time, the policy proposals of CP in the two countries diverge to some extent. Specific country political contexts such as the political opportunity structure and the manoeuvring of the populist parties may provide some explanation. Comparison with the other countries is a challenge for future research.

Keywords: Slovakia, Czechia, welfare state, right-wing populism, centrist populism

Introduction

Several studies suggest that the welfare state agenda, which has traditionally been a crucial issue for left-wing populist (LWP) parties is now becoming important for centrist-populist (CP) parties and right-wing populist (RWP) parties as well (Engler, 2020; Enggist & Pinggera, 2020; Ennser-Jedenastik, 2016, 2018; Heinisch & Saxonberg, 2021; Rooduijn & Burgoon, 2018; Spruyt et al., 2016). Populist parties are increasing their emphasis on welfare issues either because supporters of populist parties tend to be either the losers of modernisation and globalisation, who demand compensation, or they are members of the middle class, who are exposed to the new social risks and, therefore, are interested in the effective performance of the welfare state (Engler, 2020; Heinisch & Saxonberg, 2021; Rooduijn & Burgoon, 2018).

Populist voters lack trust in the ruling political elites (e.g. Mudde, 2007; Spruyt et al., 2016) and believe there is a political crisis because of the failures of the incompetent elites (e.g. Mudde, 2004; Mudde & Rovira Kaltwasser, 2013). A main reason is the perception that the welfare state does not meet the expectations of the voters (e.g. Ennser-Jedenastik, 2016; Swank & Betz, 2002; Schumacher & van Keersbergen, 2016).

This article examines the role of the welfare state agenda of the Czech and Slovak populist parties. It limits itself to those parties that either won the 2017 Czech elections and in 2020 Slovak elections or won representation in parliament. We focus on the salience and on the profile of the welfare state agenda in the election programmes of these parties. Although we cannot discuss here how the welfare state agenda contributed to the election success of these parties, we can show how welfare state agenda has developed in their election programmes. In the Czech Republic, two populist parties entered the Czech parliament: 1) the centrist-populist party ANO (Action of Dissatisfied Citizens)², which received 18.7% votes in the 2014 elections and joined a coalition government; and 2) the right-wing populist party UPD (Dawn of Direct Democracy, later SPD or Direct Democracy Party), which received 6.9% of the votes. After the 2017 elections, ANO became the leading government coalition party with

² We consider here the populist parties in both countries which Rooduijn et al. (2019) label “populist”. They classify ANO as populist but not radical right or left, while studies exist that classify it as centre-populist (e.g., Heinisch and Saxonberg 2017, forthcoming).

29.6% of the votes. Together with the Social Democrats, it formed the government, with tacit support from the Communist party. Meanwhile SPD has continued as an opposition party, but increased its votes to 10.6%.

In Slovakia, in the 2012 elections, the populist movement Ordinary People and Independent Personalities (OĽaNO) gained 8.6% of votes and RWP Slovak National Party (SNS) did not reach the threshold of 5% (4.6%). After the 2016 elections in Slovakia, two populist parties formed a coalition government: the LWP party *Smer*-Social Democracy (winner with 28.8% of the votes) and the RWP Slovak National Party (SNS) (8.6% of the votes). Two other populist parties, the CP movement Ordinary People and Independent Personalities (OĽaNO)³ and the RWP party We are family (*Sme rodina*) gained 11% and 6.6%, respectively and entered parliament as opposition parties. In the 2020 elections, however, the CP movement Ordinary People and Independent Personalities (OĽaNO) and the RWP party We are family (*Sme rodina*/SR) won 25% and 8.2%, respectively and formed a coalition government with two other small but non-populist parties (SaS and *Za ľudí*), with both parties gaining 6% of the votes while RWP SNS did not gain any seats in parliament with only 3.2% of the votes⁴. The former leading government party *Smer*-Social Democracy (LWP party) only received 18% of the votes and joined the opposition group in parliament.

Czech and Slovak populist parties serve as good examples for comparison, because of their political gains and because Czechia and Slovakia previously formed the same country, Czechoslovakia, although they have some political and cultural differences. For example, Slovakia has been less industrialised, is more religious (Catholic) and has had a less stable political system than the Czech Republic. This comparison then enables us to make generalisation on the common and distinct features of welfare state agenda of the CP and RWP parties in different post-communist countries. This comparison represents a novel contribution to this under-researched topic. In the Czech and Slovak cases, the RWP parties are not leading government coalitions. However, they give us the possibility of comparing two relatively strong RWP parties that have stable levels of support in their parliaments. In addition, we have the unique case of two CP parties which have led government coalitions.

We base our findings on the qualitative content analysis of the election manifestos of four Czech and Slovak CP and RWP parties from the years of the elections

³ OĽaNO is widely considered to be a centre-right populist movement and the leader Igor Matovič, former member of Christian Democrat Party declares himself to be social conservative. Rooduijn et al. (2019) classify OĽaNO as populist but not radical right or left. We consider it a centrist-populist party because it holds moderate or eclectic attitudes on many political issues (e.g., it is moderately pro-EU, it is not xenophobic nor against ethnic minorities), and it refuses to be defined in accordance with traditional ideological left-right dimensions. Thus, from the more general perspective we label OĽaNO a CP party, from a more narrow perspective it can be classified as a CRP party (centre-right populist party).

⁴ In Slovakia, there is also a radical right-wing party, *Ludová strana národne socialistická* / People's National Socialist Party which gained 8% of votes in the elections of 2016 and 2020. Rooduijn et al. (2019), however, classify it as a radical right party but not populist.

in 2013 and 2017 in Czechia and in 2016 and 2020 in Slovakia⁵. Election manifestos represent diagnostic frames of social demands through which the voter can identify with the party (e.g., Vasilopoulou, Haikiopoulou & Exadaktylos, 2014).

We structure the article as follows: in the next section we theorise about the links between populism and the welfare state, and how they may affect welfare state objectives and deservingness criteria applied by the CP and RWP parties. Based on this, we develop hypotheses. Then we explain data and method of analysis, and in the fourth section, we present the findings. In the last section, we conclude and discuss the findings.

Welfare state stances of Centre-Populism and Right-Wing Populism

Based on the literature, we have adopted the most commonly accepted criteria for labelling a party populist (Mudde & Rovira Kaltwasser, 2013): populism is a frame in which various societal problems are portrayed as the symptoms of a serious societal crisis, while the populist leader is an advocate for “the people” (people-centrism), who portrays the elites as being corrupt and antagonistic (anti-elitism).

Previous studies have shown a connection between welfare issues and support for populism. Considering the socio-economic profile of the supporters of populist parties, combined with the impact of recent economic downturns and the ongoing welfare state retrenchment, social policy can become an important political card for all types of populist parties. Such parties can gain support by accusing the political elites of being both incompetent and alienated from the interests of “the people”.

The situation in the CEE post-communist countries seems more favourable for populist parties: trust in political elites is low, confidence in traditional parties received a blow because of political scandals, and there is a general antipathy towards centralised and big governments (van Hauwaert & van Kessel, 2018, p. 70). Pop-Eleches (2010) argues that protest voting is crucial for understanding the post-communist electoral dynamics. In the third-generation elections, which occur after at least two different ideological camps governed in the post-communist era, voters face a shortage of untried mainstream alternatives and turn to populist parties which typically come from centre. In particular, political disaffection coupled with a lack of trust in the traditional political parties predicts support for populist parties (Havlík, 2019). Consequently, the anti-political discourse has become a common feature of the CEE party systems (Bušíková, 2019; Brunnerová, 2019; Havlík, 2019). Meanwhile, the welfare state agenda in the CEE countries has become increasingly significant because the voters have high expectations from the welfare state due to the communist egalitarian legacy (e.g. Dallinger, 2010; Pop-Eleches & Tucker, 2017), while there is a generally low level of satisfaction of the public with the actual results of social policies (e.g. Roosma et al., 2012).

⁵ Unfortunately, Slovak LWP party *Smer*-Social Democracy barely mentions social policy in its quite short 2020 election programme, which forces us to leave it out and focus on the comparison of CP and RWP parties.

CP parties

Pop-Eleches (2010) argues that the CP parties in post-communist countries are non-ideological. Such a stance helps to address a broader spectrum of voters by advocating generous social policies for distinct groups in different policy fields. Meanwhile, the CP supporters mostly come from the middle class (Heinisch & Saxonberg, 2017), who represent the typical client of public social insurance schemes and public services (e.g. Hill, 2003).

More recent studies suggest that the CP parties combine protest and ideological considerations: they attract voters with lower levels of political trust, but ideology also matters. The Central-East European CP parties have heterogeneous electorates: some CP parties may attract mainly voters from one side of the political spectrum, while others attract voters from the left or right more equally. Thus, most voters of the CP parties in the Central-East European countries do indeed seem to be more heterogeneous in attitudes on the economic dimension (Engler, 2020).

In addition, the CP parties manoeuvre when addressing the voters. The CP leaders might take different spaces on the left-right perspective, depending where the window of opportunity lies. Heinisch and Saxonberg (2021) suggest that the CP Czech ANO party attracted centrist voters because there was a gap when no viable social-liberal parties existed in the country where many voters have social-liberal welfare attitudes that combined support for generous social benefits with a distrust of the state and a desire to keep taxes low. This created an opening in the political opportunity structures, which the CP ANO filled by flexibly positioning themselves in the centre to attract educated, middle-class professionals.

In summary, there are two streams of thinking concerning the CP: one stream suggests they are non-ideological or centrist within the left-right division, attracting the protest voters and manoeuvring in their appeals, depending on how they identify the preferences of the median voters (Pop-Eleches, 2010; Heinisch & Saxonberg, 2017; Heinisch & Saxonberg, forthcoming). The other stream sees the CP parties as guided by ideology, however, all addressing the voters close to the centre. Since their ideological profile depends strongly on the contextual (national) political or societal factors (Engler, 2020; Vachudova, 2019), we consider both streams to be supplementary.

RWP parties

Most studies suggest that supporters of RWP parties tend to belong to those portions of the working class that are the losers of modernisation and globalisation processes (Kriesi, 2014; Swank & Betz, 2002; Rovira Kaltwasser, 2015). The decline in the demand for lower-skilled workers and the increase in economic uncertainties coincide with significant levels of immigration of culturally diverse people that has taken place in recent decades in Europe. Spruyt, Keppens and van Droogenbroek (2016, p. 337) note that support for populism originates from different types of experienced vulnerability. The losers of modernisation and globalisation are those who face difficulties in finding a positive social identity, irrespective of their actual competencies. This is typical for members of the lower and working classes (who face *identity*

insecurity): cultural issues are often more important for the RWP supporters than socio-economic ones. Such views lead to support for *welfare chauvinism*, which aims to exclude immigrants and other outsider groups from welfare rights (e.g., Greve 2019).

Some other studies suggest the RWP parties have a powerful incentive to blur their position on the socio-economic dimension in order to satisfy both traditional working class and petty bourgeoisie, who have contradictory preferences on socio-economic issues (e.g., Rovny, 2013). More recent studies conclude the RWP parties support generous welfare policies in a period in which many mainstream parties advocate austerity measures (e.g., Ennser-Jedenastik, 2018), although this generosity is typically combined with authoritarian attitudes on socio-cultural issues. The core clientele of the RWP became lower-skilled private sector workers, labour market “insiders” who are typically protected by classic social insurance schemes and who may be afraid to extent these rights to the outsider groups like immigrants and other allegedly undeserving groups. This is consistent with the advocacy of a traditional male breadwinner model of society and welfare support for (traditional) family (Schumacher & van Keersbergen, 2016).

Welfare state dimensions

In our study, we assess the agendas of political parties by analysing the welfare state objectives stated in their policy proposals. In conceptualising the potential welfare state *objectives*, we follow Barr and Whyne (1993), and have elaborated on their classification of welfare state objectives regarding other welfare state theories (Baldwin, 1990; Rawls, 1980; Ringen, 1987). We distinguish the following welfare state objectives: 1) poverty alleviation, 2) risk protection, 3) equal opportunities, 4) reducing inequalities, 5) social integration/risk sharing, 6) social integration/social inclusion, 7) economic efficiency, 8) efficiency-incentives, 9) administrative feasibility. We perceive the economic and administrative objectives (7, 8 and 9) as instrumental ones: they underlie effective achievement of the (main) social objectives.

Our second dimension of our analysis is deservingness. There is a key policy choice between universalism (where welfare is a social right provided to all citizens⁶) and selectivism (where welfare is provided to groups who, for some reason, deserve it) (e.g. Esping-Andersen 1990). Similarly, Enggist and Pinggera (2020) assume that universalism and particularism/selectivism comprise an important dimension of welfare attitudes among populist voters. When there is universal access to public goods, services and benefits, there are no deservingness criteria because everyone deserves the services and benefits; when access to services and benefits is selective, the distribution of these is based on deservingness criteria. Based on van Oorschot (2006), we employ the following deservingness criteria: 1) reciprocity: assessing people’s level of contribution and whether they have earned support: the higher the contribution, the more deserving; 2) control: assessing people’s control over their neediness and whether they are

⁶ This may include preferential support in access to welfare targeted at the disadvantaged groups.

responsible for it: the less control, the more deserving; 3) need: the greater the need, the more deserving; 4) identity: the closer welfare claimants are to “us”, the more deserving; 5) attitude: assessing people’s attitude towards support: the more compliant/docile welfare claimants are, the more deserving.

There are complex relationships between the deservingness criteria and social policy objectives, e.g., the objective of equal opportunities implies a universal entitlement with no applicable deservingness criteria. Risk protection and risk sharing objectives in social insurance schemes associate only with a single criterion of reciprocity. In contrast, the objectives to reduce inequalities, alleviate poverty and support social inclusion, involve quite complex deservingness criteria when assessing the eligibility for benefits. This article does not examine these relationships; our contribution is to analyse consistently and systematically the two key dimensions of the welfare state: objectives and deservingness. Some other studies focus on the principles of justice applied in welfare state policies or groups supported (Ennser-Jedenastik, 2016; Ennser-Jedenastik, 2018) or on the specific types of policies preferred (Abou-Chadi & Wagner, 2019; Engler 2020) corresponding to the tastes of the populist parties and their supporters. Objectives and deservingness criteria are, however, more concrete policy aspects than principles of justice, and these dimensions imply directly the support for the specific target groups and specific types of policies.

Hypotheses

The above discussion leads to several hypotheses. First, the CP parties emphasise economic efficiency and administrative feasibility/smartness objectives more than the RWP parties, because they balance the social liberal demands of generous benefits with low taxes by claiming that they can manage the country more efficiently. However, because the objectives of economic efficiency and administrative feasibility may be associated with anti-elitist critique, we expect the RWP parties may be also interested in emphasising these objectives (*H1 Policy efficiency hypothesis*).

Second, we expect the CP parties to address a broader range of the social objectives than the RWP parties, because they are more centrist, catch-all parties. We also assume that the CP parties would stress other objectives than the RWP parties. Such parties are also likely to advocate poverty alleviation, reducing inequality, equal opportunities and social integration, in order to appeal to a broader spectrum of the voters (*H2: the CP encompassing hypothesis*).

Third, given their centrist position and reliance on social-liberal or social-conservative, middle-class voters, we also expect the welfare agenda of the CP parties to entail some deservingness considerations based on (neo)-liberal and conservative notions of deservingness. Thus, when promoting protection and reducing inequalities, they are likely to base their policies on reciprocity and control criteria because the CP parties turn to the median voter who rejects to support free riders and other undeserving groups. Since they also appeal somewhat to left-wing voters, we expect the CP parties to promote the need criterion and equal/universal access to some welfare provisions (*H3: the CP balanced universalism-deservingness hypothesis*).

Fourth, we assume the RWP parties would emphasise the protection and redistribution in favour of deserving groups/categories, typically traditional working-class and working male breadwinners. In particular, we expect the RWP parties to favour a generous welfare state; however, with use of criteria of identity, control, reciprocity and attitude, this means limiting social benefits to the insider groups like natives, traditional families, and working people while being exclusivist towards outsiders like non-natives/immigrants, ethnic minorities and unemployed who do not genuinely seek a job (*H4 RWP exclusivist protectionism hypothesis*).

Method and data

Our research question is: *what types of social policies do the different types of populist parties propose in the Czech Republic and Slovak Republic?* We operationalised the question into categories with appropriately pre-defined subcategories assigned to social policy proposals made by each party in the manifesto. The categories of policy objectives and deservingness criteria were fully predetermined and deductively constructed based on theoretical literature.

We conducted a qualitative content analysis of the election programmes of four political parties, which took part in the Czech elections of 2013 and 2017, and the Slovak elections of 2016 and 2020. The CP parties in the Czech Republic and Slovakia (ANO and OĽaNO) won the elections of 2017 and 2020, while the RWP parties (SPD and *Sme rodina*) were elected to parliament (with *Sme rodina* joining the government coalition in Slovakia as a junior partner). We view political manifestos as diagnostic frames of social demands presented in their complexity, through which the voter can identify with the party (Caiani & Porta, 2012; Vasilopoulou, Haikiopoulou & Exadaktylos, 2014)⁷.

We explore the two key dimensions of the welfare state discussed in literature in depth: objectives and deservingness. We used the dimensions as predetermined categories to investigate their particular expression in the key programme documents addressing the voters⁸. This means that we have analysed eight election programmes and coded all sentences that contain some welfare state/social policy proposals. We conduct the analysis using axial coding guided by the key dimensions and categories of the welfare state combined with open coding. We base the open coding on adapting the grounded theory method and coded 8,376 sentences. During the process, we controlled the attribution of the categories to test the external validity of the coding by engaging a second researcher involved in our project to check the coding of the key sentences. In case of diverging views of the researchers on coding these sentences, we discussed and agreed upon appropriate solutions.

⁷ We focus just on the election manifestos as the types of condensed and complex presentation of the party programme.

⁸ This is an increasingly more systematic examination compared to the Party Manifesto Dataset where only three quite general issues are captured: WS expansion or limitation in terms of expenditure on the specified policy fields, equality in terms of protection of underprivileged groups and education expansion or limitation.

Findings: The welfare agenda of Czech and Slovak populist parties

Political context of the populist welfare state agenda

All the populist parties in our study share some common populist appeals like critiques of corruption and the allegedly incompetent elites, but they are different in other respects: the CP parties are more concerned with making the state and economy run efficiently, while the RWP parties are more concerned with supporting the traditional family and fighting against immigration. However, all of the populist parties in our study, are giving an increasingly high priority to social issues and policies.

The Czech CPANO entered the political scene in 2011 with a strong critique of the allegedly incompetent and corrupt politicians, while emphasising the apolitical, competencies of the leader who is a successful entrepreneur who could “run the state as a firm”. In the 2013 elections, the party promised to improve the state’s management and performance by focusing on the government budget, taxation, and pension system. ANO used the slogan “We are not as politicians, we work!”. In 2017, after three years of experiences in the government coalition, the programme was more elaborated and included four priorities: “security, an effective and efficient state, investments in our country, and investments in people”. The program emphasised efficiency in different social policy areas.

Czech RWP UPD, which was not in parliament before the 2013 elections, declared “direct democracy” to be a key issue, and it criticised corruption and Europeanisation, while promising to support job creation by improving conditions for entrepreneurs⁹. The successor the RWP SPD, after three years in opposition, made its priorities in its 2017 electoral platform “money to working families and pensioners” and also emphasised “education to children” and “health to the citizens”. It expressed chauvinism in the anti-immigrant slogan: “no to Islam, no to the terrorists”.

The Slovak CP movement *OLaNO*, which was in opposition that time, claimed in its 2016 election programme that “people need better services, education, health care, better state and the administration, better jobs, better living environment”. In 2020, the election programme had 10 main points, of which three were linked to welfare state: support for the family, support to education and effective social services and health-care. Thus, the focus on social issues was strong and associated with the fight against corruption.

The Slovak RWP *Sme rodina*, which was not in parliament until 2016, claimed in the 2016 election campaign that “Slovakia is poorly managed”, while emphasising the fight against corruption, protection against external threats (immigration), increasing the living standards of people and support for the traditional family. In the 2020 elections, when the party was already in parliament, the focus on the social issues was even more explicit in the election programme labelled “Programme of help for families”, with the three first priorities being family and social services, healthcare, and education. It also took a strong anti-immigrant stance with slogans such as “Against the Islamic invasion of Europe”.

⁹ In 2013 the labour market was only slowly recovering after economic slowdown of 2011 and 2012.

H1: The policy efficiency hypothesis

The emphasis put on the instrumental (economic and administrative) objectives of the welfare state is apparently high among the CP parties in the Czech Republic and Slovakia – especially in the dimension of administrative feasibility/smartness. This emphasis increased significantly with entrepreneurial CP Czech ANO between elections.

In 2013, Czech ANO’s election programme mentions economic incentives in three sentences (comprising 6.4% of the total of sentences that addressed the social policy objectives) and administrative feasibility in six sentences (12.9% of the sentences addressing social policy objectives).

In 2017, the emphasis on macro-economic efficiency increased from 0 to 16 sentences (11.8% of the sentences on social policy proposals). In this newer programme, the party also mentioned economic incentives in eight sentences (5.9% of social policy proposals). Sentences on administrative feasibility increased also significantly to 35 sentences (26.1%), see Figure 1. In total, there were 19.3% of the sentences

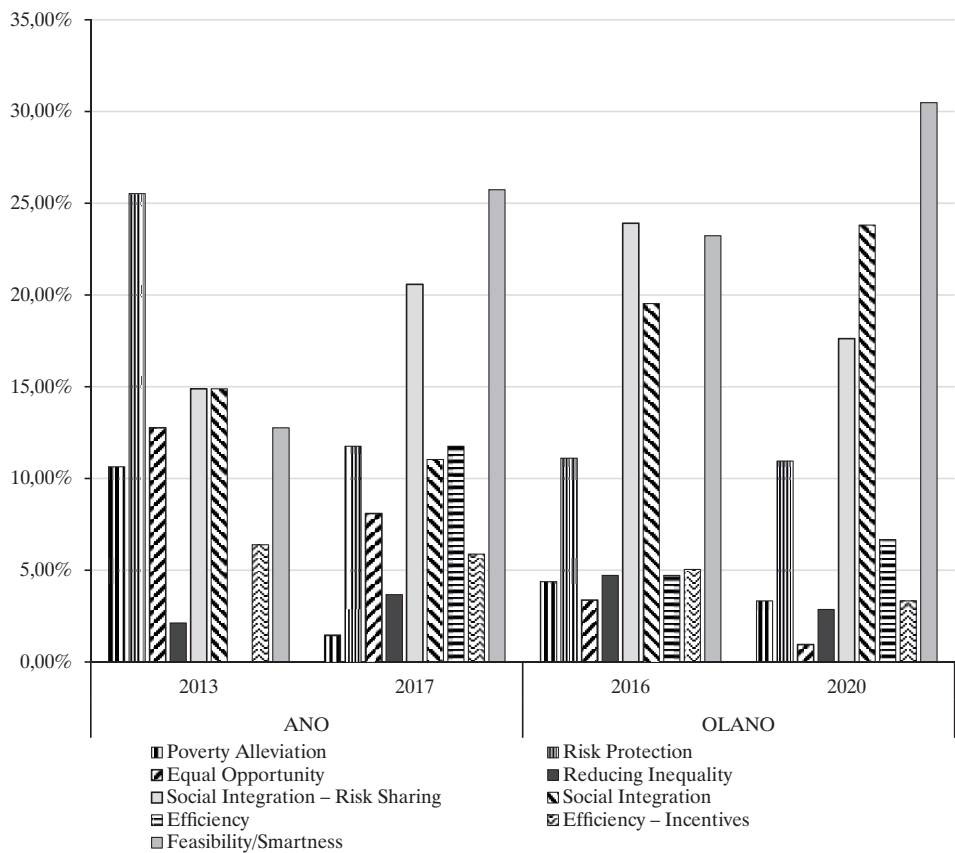


Figure 1. Social policy objectives (ANO and OLANO)

on social policy devoted to instrumental (economic and administrative) objectives of the welfare state in 2013, and 42.8% in 2017, when the party won elections.

Similar to CP ANO in Czechia, Slovak OĽaNO emphasised instrumental objectives strongly in its 2016 election programme: 11 sentences on macro-economic efficiency (3.7% of the total of sentences on social policy proposals), 15 sentences on economic incentives (5.1%), 69 (22.3%) and administrative feasibility. In 2020 the number of sentences on instrumental objectives were even higher: 14 sentences on macro-efficiency (6.7%), seven sentences on incentives (3.3%), 64 (30.5%) sentences on smartness and administrative feasibility, see Figure 1. All in all, there were 32.1% of the sentences on social policy devoted to instrumental objectives of the welfare state (8.8% economic objectives and 23.3% administrative objectives) in 2016, and 40.5% (10% economic objectives and 30.5% administrative objectives) in 2020.

Summed-up, both CP parties emphasise instrumental/efficiency welfare state objectives strongly when ANO doubled the stress on these objectives between elections in 2013 and 2017 while some of the social objectives were less emphasised (see findings on H2 below).

The election programmes of the RWP parties also emphasise instrumental objectives. The Czech UPD/SPD stresses preserving economic incentives, while Slovak *Sme rodina* stresses administrative feasibility/smartness. In the 2013 election programme, Czech UPD/SPD mentioned macro-economic effectiveness in one sentence (3.5%) and incentives in three sentences (10.3%). Administrative feasibility was mentioned in four sentences (13.8%). Similarly, in 2017 the party also mentioned macro-efficiency in one sentence (3.5%), but it increased its attention to incentives, from four sentences to nine sentences, which accounts for an increase in the percentage of policy statements dealing with incentives from 10.3% to 31%, while administrative feasibility was mentioned in four sentences, this is again 13.8% of sentences on social policy, see Figure 2. Compared to Czech CP ANO, UPD/SPD puts more emphasis on the instrumental objectives in total both in 2013 (27.6% against 19.3%) and in 2017 (57.3% against 42.8%), in contrast to our assumptions. The explanation is that RWP party used policy efficiency appeals in connection with anti-elitist critique of the ruling parties (including ANO in 2017 elections), with an emphasis on preserving economic incentives, in accord with the traditional rightist party agenda.

In 2016, Slovak *Sme rodina* mentioned efficiency in three sentences (9.7%) and administrative feasibility in five sentences (16.9%). In 2020, the party still mentions macro-efficiency in three sentences (3.2%). In this latter programme, it now names the incentives in three sentences (3.2%). It also mentions the smartness of the system in 20 sentences (21.3%). Despite this general increase in attention to these issues of efficiency, it actually mentioned administrative feasibility less in 2020 (five sentences, 5.5%), see Figure 2. This means that instrumental objectives were mentioned in 26.6% of the sentences on social policy issues in 2013 and in 33.4% in 2017, while administrative feasibility/smartness objectives prevailed clearly. This is less than it is the case of OĽaNO, where it was 42.1% in 2016 and 41.5% in 2020, although emphasis on administrative feasibility/smartness is similarly strong.

To sum up, the policy efficiency hypothesis holds well with the CP parties in Slovakia, where the CP party over-scores the RWP party in the emphasis put on instrumental

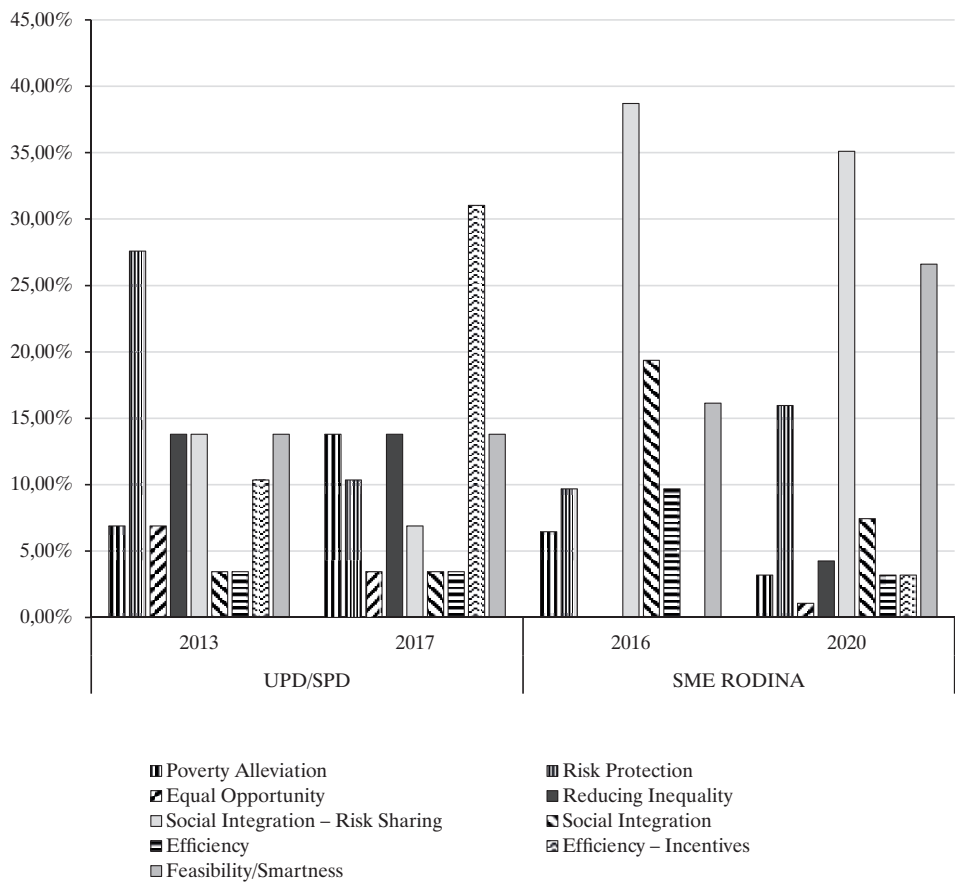


Figure 2. Social policy objectives (UPD/SPD a SME RODINA)

objectives. In Czechia, RWP UPD/SPD stresses economic incentives so much as it over-scores CP ANO in emphasis put on instrumental objectives. We may associate this finding with anti-elitism, and a strong critique of the left-centre government where ANO was a junior partner since 2013.

H2: CP encompassing hypothesis

The CP parties emphasise a broader range of welfare objectives than the RWP parties. Concerning risk protection, in 2013 ANO emphasised protection over the life-cycle (in nine sentences, amounting to 25.5% of all policy proposals), poverty alleviation (in five sentences, 10.6%). For the equality dimension, the party supports equal opportunity (six sentences, 12.8%) and fewer supports reducing inequalities/redistribution (one sentence, 2.1%). In the social integration dimension, it emphasises risk sharing/collectivity of risk protection (nine sentences 19%) and social inclusion (seven sentences, 14.9%).

In 2017, ANO decreased its advocacy of risk protection over the life-cycle (16 sentences, this is 11.8% compared to 25.5% in 2013). It mentioned poverty alleviation in two sentences (1.5%), which is much less than in 2013 (10.6%). In the equality dimension, the party pursued the objective of equal opportunity (in 11 sentences, 8.1%), which is slightly less than in 2013 (12.8%). Concerning the social integration dimension, the party promoted risk sharing/collectivity of risk (in 28 sentences, 20.6%) and social inclusion (in 15 sentences, 11.9%). The percentage of sentences devoted to social policy proposals mentioning these topics is similar to 2013; see Figure 1. This shift in focus, where some social objectives are less stressed regarding risk protection and inequality reduction, is because of the increased emphasis on the instrumental objectives (see above on Hypothesis 1).

In 2016, Slovak OĽaNO strongly emphasised the dimension of risk protection, mentioning risk protection over the life-cycle in 33 sentences (11.1%). It paid less attention to social equality, mentioning equal opportunity in 10 sentences (3.4%) and reduction of inequality (in 14 sentences, 4.7%). It showed much greater interest in social integration, mentioning risk sharing/collectivity of risk in 61 sentences (23.9%) and the social inclusion of the most vulnerable in 58 sentences (19.5%).

In 2020, the pattern was quite similar, although the party showed less interest in the equality sphere. It now only mentions equal opportunity (in two sentences, 1% compared to 3.4% in 2016). It also mentions redistribution/reduction of inequality less often (in six sentences, 9% compared to 4.7% in 2016). Once again, it mentions risk protection in 23 sentences, making it 11% of total sentences on social policy proposals. Thus, a percentage of sentences devoted to risk protection remained the same as in 2016. For the social integration dimension, it mentions risk sharing in 36 sentences (17.6%) which is less than in 2016 (23.9%). Finally, the party also mentions the social inclusion of the most vulnerable in 50 sentences (23.9%), which is now the most important issue (in 2016 it was 19.5%); see Figure 1. Thus, the party stresses still social inclusion of the most vulnerable and risk sharing in the first place.

The encompassing hypothesis seems to hold for both Czech and Slovak CP parties since they emphasise risk protection over the life-cycle, accompanied by solidaristic proposals on risk sharing and inclusion of the vulnerable. Czech ANO also highlights equal opportunities. Even though there have been some changes in emphasis, the basic pattern has basically been stable through the two electoral periods. Apparently, it wanted to appeal to the middle class and to those traditional working-class members who favour social insurance over redistributive policies.

The RWP parties support some different objectives than the CP parties. In 2013, Czech UPD/SPD stressed risk protection over the life-cycle objective (in eight sentences, 27.6%), poverty alleviation (in two sentences, 6.9%). It mentioned equal opportunity in two sentences (6.9%) and inequality reduction in four sentences (13.8%). Similarly, it mentioned risk sharing in four sentences (13.8%) and social inclusion in one sentence (3.5%).

In 2017, it gave greater emphasis to redistribution and poverty alleviation while downsizing risk protection and equal opportunities objective, when mentioning risk protection in three sentences (10% compared to 27.6% in 2013), poverty alleviation in four sentences (13.8% compared to 6.9% in 2013), equal opportunity in one

sentence (3.5% compared to 6.9% in 2013), reduction of inequalities in four sentences (13.8% similarly to 2013), risk sharing in two sentences (6.9%, similarly to 2013) and social inclusion in one sentence (3.5%, similarly to 2013), see Figure 2.

Slovak *Sme rodina* is more strongly concerned with social integration and risk protection over the life-cycle than other social policy objectives, similar to the Slovak CP party *OLaNO*. In 2016, the party program centred on the following objectives: risk protection across life-cycle (three sentences, 9.7%), poverty alleviation (two sentences, 6.5%). In particular, for the social integration dimension, the program strongly emphasised risk sharing (12 sentences, 38.5%) and social inclusion (six sentences, 19.4%).

In 2020, the electoral program paid increased attention to social policy issues. Thus, risk protection over the life-cycle increased from three (9.7%) to 15 sentences (16%), while poverty alleviation dropped from two sentences (6.5%) to three sentences (3.2%). Concerning the equality dimension, equal opportunity remained rarely mentioned objective with only one sentence (1.1%, while it was not mentioned at all in 2016), although the program now mentioned inequality reduction in four sentences (4.3%) compared to no mention in 2016. Risk sharing remained the most important issue for the party, being mentioned in 33 sentences (35.1%, only slightly less than in 2016). However, it placed less value this time on social inclusion, mentioning it in seven sentences (7.5%) against 19.4% of sentences in 2016, see Figure 2.

The RWP parties place great emphasis on risk protection over the life-cycle and solidaristic risk sharing. These objectives are associated with social insurance compensatory schemes based on the merit principle, corresponding to the preferences of the traditional working-class insiders. This is accompanied by a stronger demand for redistribution and poverty alleviation with Czech RWP UPD/SPD than with Slovak *Sme rodina*. This is probably because of the political opening in Czechia where the social democratic party imploded. This encouraged the RWP party to appeal to the most affected losers of modernisation who do not trust the left-wing parties. In contrast, in Slovakia, the populist LWP party, *Smer-Social Democracy*, is still able to appeal to the losers of modernisation. All in all, the RWP parties in both countries are less encompassing in their social policy objectives than the CP parties.

H3: CP balanced universalism – deservingness hypothesis

When it comes to social objectives, the CP parties promote catch-all social policy proposals. Either universalism prevails in their proposals over selectivism and use of deservingness criteria, or the criterium of need is the most important of the deservingness criteria, followed by the criterium of reciprocity. Exclusionist criteria only have a supplementary role in order to prevent the misuse of the entitlements.

The proposals of Czech ANO in 2013 are mainly based on universalist principles (in 10 sentences, 43.4% of all sentences on social policy), followed by the reciprocity criterion (in seven sentences 30.5%) and the need criterium (in six sentences, 26.1%). The party program also mentions the control criterium in five sentences (21.7%). In 2017, the pattern is similar, however, the overlap between universalist and selectivist principles is even more apparent. Universalist principles still clearly dominate and become even more important (mentioned in 24 sentences, 52.4% of all the sentences on

social policy proposals compared to 43.4% in 2013). A reason could be that the party tried to appeal more to social democratic voters in 2017, as the social democrats were losing support because of infighting. The need criterium follows and plays a similar role as in 2013, with 12 sentences, thus comprising 28.6% of all social policy focused sentences in 2017. While universalism has become more important for ANO and the need criterium has remained about the same, the reciprocity criterium has become less important, being only mentioned in four sentences. This represents a decline from 30.4% of all social policy sentences in 2013 to 9.5% in 2017. Next comes the control criterium (three sentences, comprising 7.8%) and the attitude criterium two sentences (4.8%), see Figure 3. The decline in the party's stress on control (from 21.7% to 7.8% of sentences) and reciprocity could also be a sign that the party wanted to attract former social democratic voters in 2017.

Similarly, in 2016 Slovak OĽaNO highlights universalist principles (in 93 sentences, 47% of all social policy proposals), followed by the need criterium (in 58 sentences, 29.3%), and the reciprocity criterium (in 11 sentences, 5.6%). In contrast to Czech CP ANO, the party places greater stress on control, mentioning this criterium

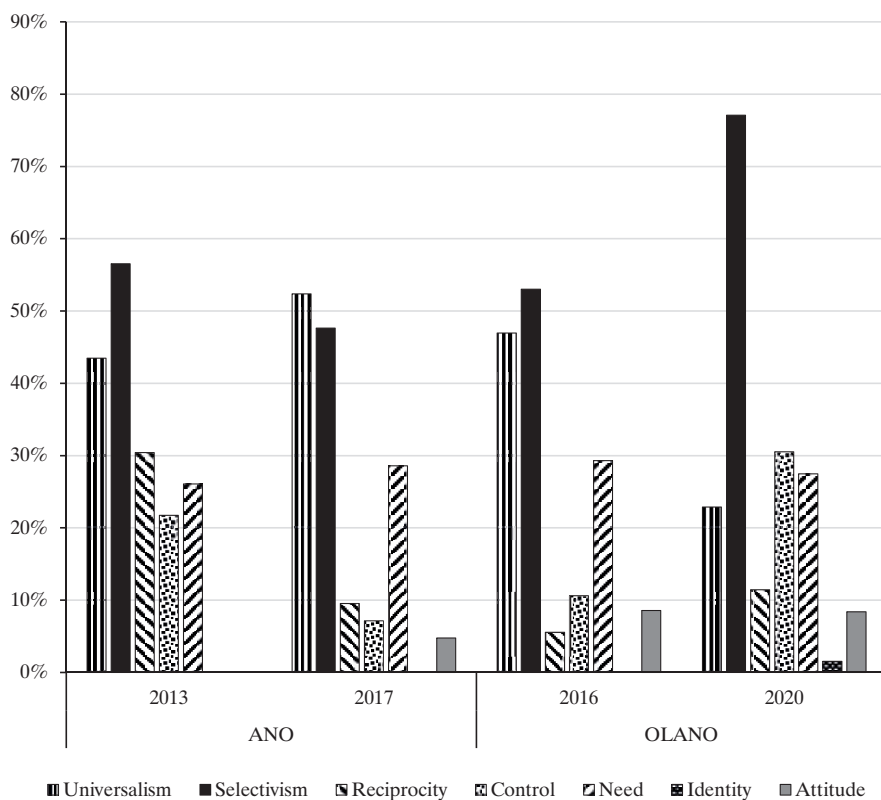


Figure 3. Deservingness in the policy proposals (ANO and OĽaNO)

in 21 sentences (10.6% compared to 18% for ANO in 2013). It also pays more attention to the attitude criterium, mentioning it in 17 sentences (10.6% while ANO did not mention it in 2013). In 2020, the party shifted even more to the right ideologically. “Leftist” views such as support for universalism (in 30 sentences, 22.9%) and need (in 36 sentences, 27.5%) remain the party’s most commonly used arguments, but universalism dropped from 47% of all policy proposals to 23% and need criterium kept nearly the same emphasis.

Reciprocity actually increased being mentioned in 15 sentences, which accounts for 11.5% of all sentences in the program devoted to social policies, compared to 5.6% in 2016. Even though the more “rightist”, exclusionary criteria are less prevalent, their salience has increased in 2020. Thus, the party’s program mentions control in 40 sentences compared to 21 sentences in 2016, accounting for an increase from 10.6% of all sentences to 20.5% of all sentences devoted to social policy. Also, the party mentions the attitude criterium again in 11 sentences (8.6%), which is like in 2016 when it was mentioned in 17 sentences (8.4%). The 2020 program also now mentions identity in two sentences (1.5%), see Figure 3.

We have analysed the specific profile of ANO’s and OLaNO’s universalism in their winning elections using quantitative text analysis. We have identified the most frequent words in sentences coded as associated with universalism in their election programmes (see Annex). Universalism by ANO, which increased in the elections of 2017 with the shift to the left, seems to be all-encompassing. First, ANO stresses the provision of public goods by the state, as shown by frequent words such as “services”, “care”, “healthcare”, and “education”. At the same time, ANO’s universalism is associated with managerial competence promises as shown by words such as “development”, “financing”, “management”, “investment”, “state” and “system”. OLaNO decreased emphasis on universalism in the elections of 2020 with the shift to the right (see above), however, with all-encompassing focus showed by words like “people”, “all”, “citizens”. It also shows a concern with the effective role of the state and with the social system design (“state”, “system”, “public”, “infrastructure(s)”) while much less concerned with the associated managerial competencies. Similarly to ANO, OLaNO emphasises the provision of public goods: “care” above all, and also “services”, “education”, “health” and “work”.

Thus, both centrist populist parties are similar in focusing their universalism on the provision of public goods, while accentuating state responsibility. This appeals to the broad categories of voters, both the middle and working class interested in these provisions. Overall, the hypothesis on the CP inclusiveness holds. Nevertheless, the CP parties have thin ideologies that allow them to manoeuvre in their election programmes. Thus, OLaNO shifted to political right in last elections, putting slightly more emphasis on selectivism. The reason is that political opening was identified on political right: in Slovakia, since 2012, there has not been any strong non-populist rightist party in Slovakia while some of the RWP parties imploded (like SNS) after the 2016 elections. In contrast, the populist left-wing *Smer*-Social Democracy still represents a powerful rival. In Czechia, ANO shifted to the left as the social democrats were imploding by placing more emphasis on universalism and less on the control criterium. This may show that ideological stances of the CP parties conform to the windows of political opportunities, depending on the specific country context.

H4: RWP exclusivist protection hypothesis

Czech and Slovak RWP parties do not seem to be *exclusivist* or particular towards some specific groups of people in their social policy proposals from the last two elections. Nativism is not a guiding deservingness criterium in their welfare state agenda, although in 2020 in Slovakia the RWP party started to give increasing importance to the demand for greater control. This finding shows that the RWP parties are trying to appeal to the traditional working class and, possibly, to the broader spectrum of the voters, while avoiding exclusivist proposals. In addition, in Slovakia, there are already RW parties that are exclusionary like fascist LSNS and populist SNS, so not much expected gain for *Sme rodina* to compete on this issue. The main explanation is, however, that, in Czechia and Slovakia, refugee immigration is negligible. At the same time, the social rights of immigrants from the third countries are rudimental, so there is no reason to exclude the non-native population in policy proposals.

To be concrete, in 2013 election programme, Czech UPD emphasised universalist principles more than any other social policy principles (in 11 sentences, 72.7%), followed by the need criterium (three sentences, 27.3%), then the control criterium (one sentence – 9.1%). In 2017, the successor SPD party shifted from universalism to selectivism, although reciprocity and need criteria which are not exclusivist in nature prevailed strongly. Thus, universalist principles decreased from 11 to three sentences (a decline from 72.3% to 25% of all social policy proposals). The need criterium grew as a proportion of all sentences in the programme dealing with social policy from 27.5% to 50% (six sentences). The SPD also mentions the reciprocity criterium in seven sentences (58.4%). Control and attitude criteria are only marginal (one sentence, 8% each), see Figure 4.

In the 2016 election programme, Slovak *Sme rodina* gave the greatest weight to universalist principles (12 sentences, 54.6% of all sentences on social policy), followed by the need criterium (two sentences, 9.1%), and reciprocity criterium (one sentence – 4.6%). The party did, however, also employ more exclusivist criteria. This includes the control criterium (four sentences, 18.1%), as well as the attitude and identity criteria (two sentences in both cases sentences, 9.1% each). In 2020, the party stressed the control and need criteria, while downplaying universalist principles. The proportion of sentences promoting universalism decreases from 54.6% (2016) to 34.8% (2020). The need criterium, however, plays a much greater role in the 2020 party program, increasing from two sentences to 16 sentences, bringing an increase in the portion of sentences on social policy devoted to need from 9.1% to 23.2%. In contrast to 2016, the programme mentions the reciprocity criterium more, as a proportion of sentences devoted to social policy (increase from 4.6% to 7.3%). The selectivist/exclusivist criteria comprised the most frequent control criterium (in 23 sentences – 33.3%), and marginally attitude (one sentence – 1.5%), see Figure 4.

In summary, the RWP *exclusivist protection hypothesis* does not hold up for the largest RWP parties. As suggested by Rovny (2013), similar to the CP parties, RWP parties in Czechia and Slovakia seem to blur their positions in this respect by balancing universalist and selectivist proposals. They also spout a thin ideology that allows them to manoeuvre and look for political openings, where they can alter their profile to gain

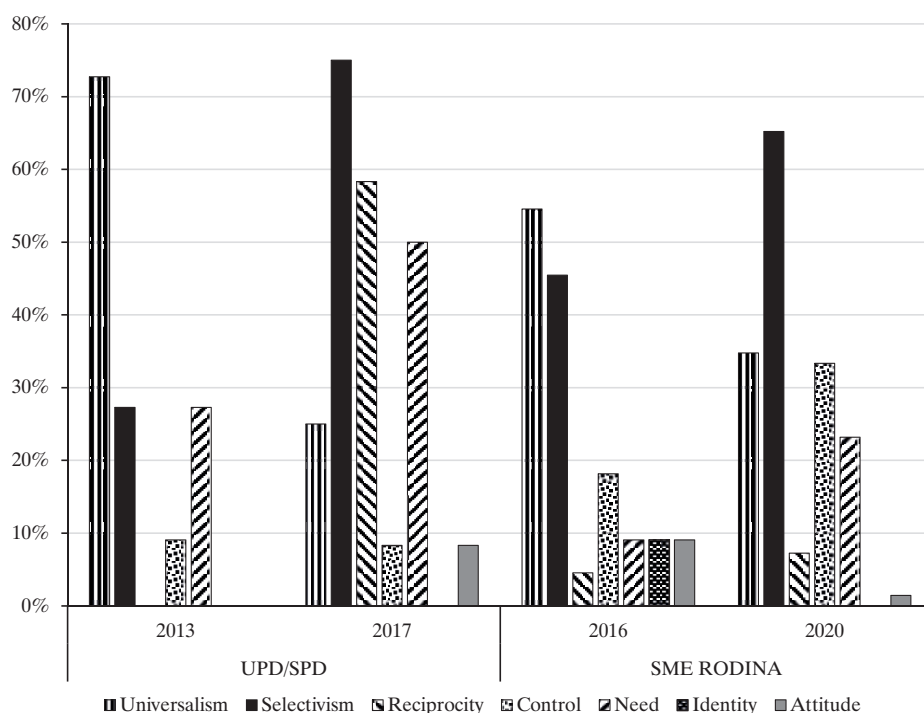


Figure 4. Deservingness in the policy proposals (UPD/SPD and SME RODINA)

support from a broader spectrum of voters. This strategy, however, may be specific only to the two countries in focus, emerging here from a low salience of the agenda of social rights for immigrants due to low immigration of refugees and rudimentary social rights of the third countries immigrants. On the top of that, Czech RWP SPD is strongly against immigration in principle, so there is less reason to be anti-immigrant exclusivist in its social policy proposals. Since Slovakia has two radical right parties, SNS and the fascist LSNS, *Sme rodina* might have seen an opening in the more ethnically tolerant but socially conservative right, as the party emphasised support for the “traditional family” rather than fear of immigrants and minority groups.

Conclusions and discussion

We have examined the welfare state agenda of four leading populist parties (two CP parties and two RWP parties) in Czechia and in Slovakia as presented in their election programmes along the objectives of the policy proposals and universalism–selectivism distinction and deservingness criteria applied.

H1 policy efficiency hypothesis holds well with CP party in Slovakia. However, in the Czech Republic, the RWP party emphasises instrumental objectives (economic

efficiency/incentives above all) even more than the CP party. This is a surprising finding since the CP Czech party represents entrepreneurial populism, in which the leader is a successful businessperson who claims to run the country efficiently, like a business. The reason why the RWP appeals to economic incentives could be because of its anti-elitist critique of the centre-left government which neglected this objective.

H2 CP encompassing hypothesis seems to hold, since the CP parties stress risk protection over the life-cycle. They also suggest solidaristic proposals on risk sharing and inclusion of the vulnerable. Czech ANO also highlights equal opportunities. This policy direction appeals to middle class and working-class insiders. Their emphasis on the vulnerable and equal opportunity distinguishes them from the RWP. The RWP parties are less encompassing in policy objectives: They accentuate risk protection rather than the life-cycle objective. Czech RWP UPD/SPD additionally advocates greater redistribution and introducing measures to alleviate poverty.

Similarly, *H3 CP the balanced universalism-deservingness hypothesis* holds. Both centrist populist parties emphasise universalism on the provision of public goods, combined with state responsibility, while also stressing deservingness criteria: need, control, and reciprocity. At the same time, CP parties are flexible and manoeuvre in their election programmes when they see changes in the political opportunity structure. Thus, OĽaNO seems to have seen an opening on the right in the 2020 and became less universalist, while ANO saw an opening more to the left in 2017 and stressed universalism more in an attempt to lure former social democratic voters.

The *H4 exclusivist protection hypothesis* holds for RWP parties partly: Similar to the CP parties, RWP parties in Czechia and Slovakia seem to blur their issue positions regarding welfare state issues and manoeuvre in order to gain support from a broader spectrum of voters. They both avoid exclusivist and nativist proposals. This strategy, however, may be specific, emerging from the specific immigration context and connected poor welfare state rights of the immigrants.

This study shows that the differences in the welfare state agenda of CP parties and RWP parties are not as significant as previous studies would have expected: in particular, in Czechia, the RWP party emphasises instrumental policy objectives more than the CP party. Second, RWP parties are not exclusionist in their welfare protectionism. Specific country contexts may help to explain this finding.

This backs the notion that populist parties have thin ideologies, which makes them flexible. It also supports the claim (Heinisch & Saxonberg, forthcoming) that populist parties adapt their policies based on where they see the openings in the political opportunity structures. Thus, specific country political contexts may provide some explanation for these shifts and divergencies, as some studies suggest (e.g., Engler, 2020; Heinisch & Saxonberg, forthcoming). Comparison with the welfare state agenda of the populist parties in other countries is a challenge for future research.

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ANNEX

Table 1. Occurrence of 20 most frequent words associated with the category “universalism” (absolute and relative count of words in sentences associated with universalism, weighted percentage)

ANO 2017	Count	Weighted percentage (%)	OLaNO 2020	Count	Weighted percentage (%)
Development	47	0.31	People (genitive or accusative case)	99	0.26
Services (genitive case)	46	0.30	State	86	0.22
State	43	0.28	State (genitive case)	86	0.22
Care (genitive case)	40	0.27	System	80	0.21
All (genitive case)	36	0.24	Care (genitive case)	79	0.20
Financing	34	0.23	Services	69	0.18
State (genitive case)	34	0.23	Care	56	0.15
System (genitive case)	29	0.19	Services (genitive case)	52	0.13
Healthcare	28	0.19	All (genitive or accusative case)	44	0.11
Services	27	0.18	Health (adjective, genitive case)	44	0.11
All (accusative case)	27	0.18	Environment	44	0.11
Work	25	0.17	Public (adjective, genitive case)	43	0.11
System	25	0.17	Citizens (accusative case)	41	0.11
Management	25	0.17	Work	41	0.11
Children	23	0.15	Education (genitive case)	41	0.11
State (adjective)	23	0.15	Education	41	0.11
Investments	23	0.15	Infrastructure (genitive case) or Infrastructures	40	0.10
Education	22	0.15	Problems	40	0.10
Culture	20	0.13	System (genitive case)	39	0.10
Citizens (accusative case)	20	0.13	Public (adjective, plural)	39	0.10

Source: election programmes, own coding and computations

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Social Policy or Vote-Buying: Recent Cases of Serbia and Montenegro

Abstract

The paper examines recent social interventions in Serbia and Montenegro, a Montenegrin tax reform aiming to increase salaries and a Serbian-wide scheme of cash transfers. These cases are examined through the prism of populism and political pragmatism trying to show how social policies and social interventions are prone to be used as part of the efforts to generate wide electoral support. The paper discusses social policies in the post-communist environment arguing that communism generated a set of norms and expectations that make social policies in Central and Eastern Europe more vulnerable to being manipulated for acquiring political gain than in some other countries. The aim of this paper is to draw attention to the need for more serious and more long-term social planning which will not be subordinated to the short-term political goals. Only with that being achieved, countries in the Western Balkan will be able to see higher socio-economic progress.

Keywords: Western Balkans, populism, post-communism, social policy

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Introduction

The Western Balkan area represents a political rather than geographical term, with countries sharing the same communist and conflict past as well as the hopes for a joint European future. Even though the countries are usually considered democratic, international organisations' reports continuously warn about a number of undemocratic practices present in the region. Although the paper focuses on the cases of Serbia and Montenegro, the whole region faces similar challenges of political corruption, increasing emigration, political polarisation, nationalisms, etc. The process of negotiations with the European Union has brought many benefits to the given countries, mostly in terms of access to pre-accession funds, but it has also led to a certain level of accession fatigue and demotivation, due to its length. When it comes to political and economic policy-making, European Union and other donors have a very strong presence in the region. However, the area of social policy does not seem to be under the spotlight, which can also be seen from the fact that the social protection systems in the region have not been properly reformed ever since the fall of communism (Sotiropoulos, 2014). On the other hand, both Serbia and Montenegro have a history of strong political polarisation and have been run by political leaders belonging to the charismatic leaders type. Existing socio-economic problems have often been blurred by national polarisations or other topics that had the aim to divert the attention away from poverty, corruption, emigration and other issues. In this kind of environment, policy choices can often be driven by a desire to gain wider political support, than by the desire to actually contribute to the long-term change that brings benefits to all of the citizens. It is important to state that the European Union did not prioritise social policy and it has failed to deliver a clear vision of the social policy in the enlargement countries (Cerami, 2005, p. 54). The enlargement process has mostly been focused on issues related to chapters 23 and 24, dealing with the judiciary, rule of law and corruption, leaving the area of social policy to be regulated completely by the governments.

This paper tries to explore how social policies are being used in this context and argues that social policies have a higher potential of being used as political manipulation tools than policies in some other areas. Also, the paper argues that social policies are more easily manipulated in post-communist countries than in countries that did not have a socialist past. The paper discusses several measures undertaken by the Serbian and Montenegrin governments in the previous period and analyses them through the prism of populism and political pragmatism.

The first part of the paper provides review of the existing literature related to the development of social welfare systems in the post-communist countries as well as the social policies and their relation to populism in the given context. The second part of the paper gives a brief overview of the socio-economic situation in Serbia and Montenegro, followed by the description of recent governmental interventions aiming to enhance living standards of their citizens. Those interventions are then analysed from the populist standpoint and the paper aims to provide answers to how much of those interventions are motivated by the desire to increase the living standard of the people or by the need to deliver fast results in order to gain support prior to the new elections.

Finally, the conclusion summarises the findings warning about the importance of higher European Union influence when it comes to the development of social policies in the region.

Post-communism and social policy

After the fall of communism, efforts of the region as well as the international community, were focused on political and economic reforms. Transition to the free market and building of democratic institutions that would be able to lead the transition process were the main priorities, which caused social policies to fall off the main agenda. The transformation of the social sector was, thus, much less thorough and it was rather a build-up of the already existing practices. Faced with the internal challenges and external pressures most of the countries opted for the Bismarck welfare state model. That kind of model was already present in the pre-communist period and the institutions necessary for its implementation were already in place (Cerami, 2005, p. 53). Cerami states that the post-communist countries managed to block the instructions of the international actors and to establish hybrid social policies that were in line with their cultural and historical context (Cerami, 2005, p. 69). However, despite certain small-scale reforms, the reconstruction of welfare regimes has been left incomplete since 1989 (Sotiropoulos, 2014). Nevertheless, even if the more thorough reforms were implemented it is questionable whether the system would be significantly different. As Cerami (2005) states, 40 years of communism have produced values which are likely to survive the pressures from recent transformations and that would result in the creation of the common post-communist welfare state. Contemporary welfare states in Central and Eastern Europe were not created by dictate or design, they were “built on communist and pre-communist ruins” (Cerami, 2005, p. 48). Post-communist countries did not go too far from what already existed in the communist period in regard to the social protection system, and there were at least two reasons for that. The first one was the institutional setting that was already in place, so the logical solution was to perform transition by using existing infrastructural and institutional settings which allowed for a faster transition. The second reason was the expectations that people had from their government in relation to social issues and protecting mechanisms. Communist institutions have generated a set of norms, expectations and assumptions that have shaped the outlook of the future democratic institutions (Offe, 1996, p. 217 cited in Cerami, 2005).

Those expectations are what, as I argue, makes social policy more prone to be used as part of the vote-buying strategies in post-communist than in some other countries that do not have that web of values and expectations from their governments. More generous social benefits are in many countries frowned upon as they are seen as over-regulation and as government trying to dictate all aspects of our life. However, that is mostly reserved for Western countries that do not have a history of the welfare state, like, e.g., the USA. Therefore, it is expected to have a debate in the USA on whether child benefits should be introduced or whether social security benefits should be increased. Those kinds of promises would not necessarily bring political points,

sometimes even the opposite, but for the post-communist countries, the situation is different. Due to the long history of living in a socialist state, certain benefits are not and cannot be perceived as governmental interference, but rather as a government doing its job. Unemployment benefits, social security, cash transfers for the most vulnerable ones, universal healthcare and education are seen as a minimum that government can do in countries with a history of communism, while in some other places it can be seen as overregulation. That is why an increase in social transfers will almost definitely be seen as a good thing by the voters in the post-communist countries, while in some other parts of the world it can be the opposite.

Social policies and populism

Menachem states that social policy is based on moral value on one side and socio-economic constraints on the other side, but that it essentially expresses the desire for social solidarity (Menachem, 2015, p. 491). This definition might be correct in an ideal world where policymakers do have the best interest of their constituents in their minds. But often that is not the case, therefore, it is wrong to attach any positive or negative connotation to what social policy expresses. Sometimes, it certainly expresses the desire for social solidarity, but on other occasions, certain social policies can be driven by other motivations, which will be the topic of this paper. Although many definitions of social policy try to integrate the ethical principle and imply that the essence of the social policy is a desire for higher solidarity, taking care of the weak and the just distribution, in today's world it would be much more suitable to use the definitions that are limited to the scope of the social policy, not the motivations behind it. The author of one of such definitions is Gal (2011) who defines social policy as choices authorities make in order to achieve residents' well-being in areas of education, health, welfare, employment, housing, social security and personal welfare security.

As social policies often include cash transfers and, generally, do imply some kind of financial or in-kind assistance for citizens, these measures have a large potential of being politically manipulated and used as part of the vote-buying strategy. Social policies are a wide spectrum of mutually dependent and comprehensive interventions in the area of taxes, education, labour market, human services, etc. aiming to reach a long-term and sustainable increase in the quality of life of citizens. But, sometimes, those interventions can be as simple as increasing cash transfers, introducing (or increasing) child allowance, introducing one-off payments to the elderly or vulnerable categories, etc. and these kinds of interventions show immediate results and are more or less sustainable, depending on their nature. These kinds of interventions within social policies are what make this policy area prone to political manipulation, due to their relatively high power in making voters happy in a short period of time.

Political, economic and social background in Serbia and Montenegro

There are many debates on whether Serbia, Montenegro, and other Western Balkan countries can be considered consolidated democracies or not (Sotiropoulos,

2011; Marovic, 2016). Even though both countries fulfil the minimum requirements seen as competitive election process held on a regular basis, there are many issues that pose a serious threat to the democratic nature of the countries, such as high corruption, inefficient judiciary, political influences in media, etc. (United States Department of State, 2020). The type of capitalism present in the region “allows the war of all against all, the devouring of whole business sectors by one business conglomerate and the moulding of labour relations at will, in the context of high unemployment rates, and flourishing black markets which state authorities just watch grow, incapable or reluctant to intervene” (Sotiropoulos, 2017, p. 24).

Politics in the two countries are not run by clear ideological principles, but most of the parties are rather catch-all parties trying to gain voters from all political spectrums (Bieber, 2018; Goati et al., n.d.). There is no homegrown political vision for the future of the countries in terms of ideology (Sotiropoulos, 2017, p. 67). The internal and external pressures force political parties in these countries to distance themselves from traditional left-right political polarisation and try to accommodate as many voters as possible. The absence of a clear ideological division on the party level also affects the voters without strong ideological opinions and, therefore, the ideology is mostly not a decisive factor in the elections. In fact, many political parties have ideological references in their names, which are actually far from the essence of their politics.

In terms of governmental and political stability, while Montenegro had a stable government led by the Democratic Party of Socialists (Cnr. *Demokratska partija socijalista*, DPS) for almost 30 years, Serbia has seen several power shifts. During the recent period, the situation changed and while DPS in Montenegro has been thrown from the power in the elections in 2020, the Serbian Progressive Party seems to have a long period of stable governing in front of them.

Economically, both Serbia and Montenegro have real GDP per capita levels below the EU average and are struggling with many economic issues, especially after the emergence of COVID-19 (World Bank, 2021). Economic institutions predict that although some Western Balkans economies are starting to show signs of recovery after the COVID-19 pandemic, employment rates are still deteriorating and poverty levels are increasing, with a strong possibility of inequality growth (Council of Europe Development Bank, 2021). Economic activity is concentrated in low-value sectors. Investment in education remains lower than the EU average. When it comes to the total spending per student ages 6–15 for the year 2015, both countries are seriously lagging behind the EU members – Serbia at 24.29 and Montenegro at 22.03, while the EU average was 90.03. Both countries are struggling with skills mismatch and labour underutilisation. The level of youth unemployment is around 17% in both countries (Valescka & Yannic, 2017). Emigration rates are lower than in other Western Balkan countries, but still worrying in terms of brain drain and human capital development. In 2018, the emigration rate was 1.3 in Serbia and 0.5 in Montenegro. The pandemic has put additional pressure on the existing social issues, especially in regard to the low-income families and vulnerable populations. This situation obviously demanded social policy intervention, but, at the same time, it created legitimacy for increased cash transfers to be used as part of the vote-buying strategy as will be discussed later.

Recent social policy interventions in two countries

After the 2020 parliamentary elections, the Montenegrin government was formed by three political coalitions belonging to different ideological spectrums, united in the desire to throw DPS out of power. The agreement was to form an expert, rather than a political government, and none of the government members was a politician except for the Deputy Prime Minister. The government lasted a little bit longer than one year, with a no-confidence vote on it in January 2022. During the short term, the government did manage to adopt a set of laws comprising a programme called “Europe Now”, which is considered one of the biggest economic reforms in the previous period. The laws are mostly related to tax issues and they transfer a significant portion of the employers’ tax obligations to the state, leading to an increase in the net value of the salary. The biggest novelty of the programme is that, as of January 2022, the minimum salary will be 450 euros compared to the previous 250 euros. At the same time, all employees will get an increase in salary because the state lowered the employer’s obligation towards health and pension insurance. Namely, the gross amount that the employer has been paying so far remains the same, but the net amount that the employee is getting is being increased. This set of laws has been greeted by the overall Montenegrin public, leaving many economists sceptical or at least not ready to make conclusions yet. They are showing a certain level of reservation towards this programme, warning that there has been no actual economic growth that would lead to the increased salaries and that these kinds of experiments may not be sustainable and good for the overall economy (Kostic: *Projekat “Evropa Sad” nosi velike rizike*, 2021). Many are warning that there are no publicly available data or analysis that this program was based upon and that the rationale behind these laws has not been clearly communicated. However, the nature of this program and the benefits it brings to the citizens make it hard to argue against. When the opposition expressed its reservations towards the programme, the government accused them of being against a higher living standard for the citizens. Another popular move by the government was the introduction of the child allowance for all children up to the age of six, in the amount of 30 euros per month. This measure costs significantly less than the programme Europe Now, but there is no publicly available information on how the decision-makers came to the exact amount and the age limit or what is the cost-effectiveness of the policy. What the cost-effectiveness of this policy is, will probably remain unknown since the Balkan officials are not prone to implementing serious and comprehensive evaluations of the programs in operation. However, one could rightfully ask how 30 euros a month would help the low-income family, or why middle-class and wealthy families need it. There are reasons to believe that a better-targeted policy could provide higher cost-effectiveness by granting more money to people who need it more.

As it has already been mentioned, the Parliament has voted a no-confidence to the government and the two ministers running the economic and financial sectors, which were the initiators of the programme Europe Now, have announced forming of a new political party that would compete in the next elections. They even said that their new party should be called “Europe Now”, which could be seen as a misuse of public resources. Even without the use of the name, voters will probably see

the equality sign between the new party and the program, which is likely to play an important role in electoral behaviour.

It would not be fair not to mention the previous Montenegrin governments led by the DPS, which also took many questionable decisions when it comes to the area of social policy. Their governing period did not see big or catchy actions such as Europe Now, but there were numerous controversies related to the payment of cash transfers on a local level, often to the families who are not in actual financial need, so there have been speculations as these mechanisms were being used as vote-buying. For a long time, the public sector has served as a generator of jobs in exchange for votes. There was even a publicly known rule of “one job – four votes” indicating that employing one person would bring the votes of four members of the family. These are just some of the examples that show the subordination of social policies to wider political and party goals. In addition to that, the period of the DPS rule saw adoption of what was popularly called “law on mothers”, namely, the law that envisaged that all women who had given birth to three or more children were entitled to a life-long national pension. This law was initiated by the opposition parties, but it was adopted during the DPS rule. The law was extremely criticised by the human rights activists claiming it to be discriminatory, as well as by economists, stating that it would disincentivise women from their market participation. The law was later abolished, but it did generate large support from mothers who had the right to the envisaged benefit. Although the law was supported by the parties leaning toward the right of the political spectrum, it generated wide support mostly from mothers, without the regard for their political beliefs.

It is also important to mention another program introduced by the previous Montenegrin government, which is the Programme of Professional Training for Persons with Higher Education. The programme envisages that all who get a bachelor's degree can apply for the program that would provide them with a nine-month-long paid internships within a range of Montenegrin employers from public, private, non-governmental and media sectors, etc. What is interesting about this programme is that it targets all students, not only the vulnerable groups or hard to employ categories. Furthermore, it costs from seven to 11 million euros per year which is far more than all the remaining active labour market measures combined. The programme has been implemented since 2012 and so far, more than 54 million euros have been invested in its implementation (*Zavod za zaposljavanje Crne Gore*, 2021), even though there is no evidence that the program has had any significant impact in terms of increasing employment or employability. In fact, it is often suggested that the programme discourages employers from opening job posts because they get free labour each year as part of the programme. However, it is easy to see why a programme like this can seem like a good idea to the government. A large number of young people get an opportunity to work and earn money, which may not have been available for them to find in the market (both due to the mismatch between the skills and demand and a low level of skills people have after the graduation in Montenegrin educational system). However, even though this program is not a cash transfer, it can be perceived as such as the government gives 250 euros per month to circa 3,000–4,000 young people per year, which puts a whole other perspective of the programme. Moreover, there is no evidence of its positive impact on their employability.

Serbia, on the other hand, has a slightly different political situation than Montenegro. Namely, the Serbian Progressive Party (Srp. *Srpska napredna stranka*, SNS) has been in stable power for over a decade now, and the main issue before the previous elections was not who would win, but how big the difference between the winning SNS and the opposition would be. However, the Serbian government has recently spent large sums of money as one-off cash transfers to different categories of citizens. In April and October 2021 all citizens received 30 euros, while all pensioners got 50 euros in September and additional 20 euros in December. It has been announced that pensioners would be given another 170 euros in February 2022. Also, all those between 16 and 29 years old would be given 100 euros. The cash transfers started in the period following the emergence of the pandemic and could be justified as financial assistance aiming to mitigate the economic consequences of the pandemic. However, the target groups as well as the amounts seem very arbitrary and not based on specific data of the needs of the population. Justifying these transfers as part of the pandemic relief efforts becomes less convincing the closer we are to the parliamentary, presidential and local elections scheduled for spring 2022. Economic experts are calculating that only the transfers envisaged for pensioners and the youth will amount to up to 400 million euros which is 1% of the Serbian GDP (Karabeg, 2022). Economists are asking the legitimate questions of what logic is there behind giving 30 euros to the families who earn more than 3,000 euros per month, as well as giving cash payments to all pensioners whose pensions were not affected by the pandemic, while, at the same time, no one is helping the 500,000 of the unemployed in Serbia.

The Serbian Government insists that the money will enhance consumption and eventually return to the budget, but the economic experts warn that this logic is not viable, since, given Serbia's large import rates, most of the consumption will go to the imported goods. In fact, data shows that out of the 600 million disseminated in 2020, only a small part has gone back to the budget through the VAT (Karabeg, 2022). With the complete absence of economic logic behind the cash transfers and having in mind the forthcoming elections there is enough material to claim that these actions are populist attempts of getting voter support. Furthermore, in regard to the cash transfers to the youth, the logic can be that the cash transfers will encourage that target group to participate in the elections, as one of the recent studies shows that only 48% of that population votes. This explanation sounds even more legitimate if it is known that president Vucic, at the same time president of the SNS, has given a public statement where he insinuated that youth will get more money if they win the elections (M.D.M, 2022). If the generally populist governing style of president Vucic is added to the picture, it would be hard to argue that these transfers are part of the serious social policy initiatives.

Discussion

When it comes to the issue of cash assistance or other forms of redistribution and the political manipulation of those, it is hard to claim what the motives of political leaders that make those decisions are, although there is evidence that suggests that

in poor countries, vote-buying is a pervasive form of redistribution in which voters receive benefits – cash or in-kind – from party brokers in exchange for their votes (Finan & Schechter, 2012; Stokes et al., 2013). Although the motives can be discussed, it is certain that when politicians have electoral motivations in designing redistributive policies they lead further away from the optimal policies (Vannutelli, 2019, p. 2). As in that case, politicians will be prone to lean towards those citizens that show the highest potential to be responsive to the given policies, and if they are not the most in need, they will be left out of the redistributive packages (Vannutelli, 2019). This theory can be applied to both analysed countries. Namely, we have seen that Serbian one-off cash transfers, apart from the smaller, universal ones that targeted all citizens, were aimed at pensioners and youth. As it has already been mentioned, 500,000 of the unemployed were not part of these targeted cash transfers. During the pandemic, the unemployed people have certainly been among the most vulnerable groups, especially due to the fact that it reduced their chances of employment. Why are they left out of this pretty generous redistributive scheme is not clear, but it is possible that the government has some other mechanisms to win this population over or that they concluded that these transfers would not be enough to win over the supporters of the opposition.

Serbia and the rule of Aleksandar Vucic have a long history of speculations and accusations of vote-buying. Media have reported the cases of vote-buying on all electoral levels, providing examples of agricultural labourers being driven to the election post instead of their fields where they were supposed to perform their agricultural work, and being paid 1,000 RSD (just under 10 euros) to vote for the SNS (Popovic, 2018). Although there were no cases that had seen epilogue in court, it is evident that the practice of clientelism and vote-buying is spread in Serbia. Vannutelli writes about the lasting period of the electoral rewards, stating that if the electoral reward for beneficial policy decay rapidly policymakers are forced to make decisions in line with short-term opportunistic goals and consequently underinvest in more sustainable and long-term initiatives that could lead to the actual welfare (Vannutelli, 2019). And this logic can be used to explain why the Serbian Government is pouring immense amounts of cash as one-off payments instead of investing in the long-term social policies, despite all the social problems Serbia is struggling with.

In the Montenegrin case, the logic was different since the Government adopted an actual set of laws that would benefit citizens in a long run. The effects would be also felt immediately, but they are designed in such a way that they could last over a longer time period. As it has already been explained, the program targeted the working population, mostly affecting those who had a minimum salary. Basically, the overall working population is affected, but the smaller someone's salary is, the bigger increase they will have. The population that is left out of the program are the pensioners. Pensions in Montenegro are also low compared to the living standard, with an average pension being 299 euros and the minimum being 150 euros (M.M, 2022) and pensioners do represent a vulnerable category, so it would be logical for the increases to target both pensioners and working population. In 2022, the pensions were increased by 2.13%, but that was still a very small increase compared to the increase seen in salaries.

It is important to mention that at the time of developing and adopting the Europe Now Program, the inflation has already been higher and is only expected to

rise. Also, there has been the possibility of different companies and grocery stores raising their prices to use the moment of higher earnings. These two things combined could make the already low pensions even lower relative value in terms of what can be bought with that amount of money. But, if we look at this situation through the prism of electoral behaviour in Montenegro, pensioners are usually strongly rooted in their political affiliations and cannot be easily swung to the other side. The older part of the Montenegrin electorate is still deeply divided among the two national sides of the political spectrum and it is possible that the government members (who were already thinking of establishing a new political party) concluded that social benefits targeted at pensioners would not be that beneficial as compared to the younger population, which is traditionally more prone to changing their political preferences. These are only assumptions based on the nature of the Montenegrin electorate, although this cannot be claimed, it remains unclear why the pensioners were left out of this reform program.

Vannutelli (2019) writes about two dimensions relevant to establishing the type of transfer. The first dimension is clientelistic vs. programmatic, where clientelist would be those transfers, whose eligibility depends on the politician's discretion, while the eligibility for programmatic transfers would be based on publicly known rules that cannot be manipulated. However, I would argue that this "clientelistic vs. programmatic" typology cannot only be based on the criteria for the redistribution, but rather by the desired or achieved outcomes. Namely, examples from this paper are mostly transfers with clear eligibility rules, yet, they do contribute to the creation of the clientelistic relations and in many cases are not embedded in the socio-economic logic of the society, but rather in the political interests of the ruling elites.. In fact, if we take into account the definition of clientelism as an exchange of votes for favours (Graziano, 1976), by applying it to the case of cash transfers in Serbia we can see that the transfers can be perceived as favours and the expected outcome are the votes, which makes them clientelistic. The second dimension used to determine the transfer type is temporary vs. permanent transfers, which indicates whether the transfers will last longer, independently of the electoral cycle (Vannutelli, 2019, p. 8). Based on this, Serbian cash transfers are clearly temporary, while Montenegrin tax reforms are without any question permanent. However, in the context of the use of social policies to affect voters, this division will not be enough since in both cases we have an immediate effect on the potential voters that can be capitalised on in terms of votes. Therefore, in analysing social policies, I suggest a three-fold categorisation in relation to the duration: 1) temporary, 2) permanent that brings immediate benefits to the citizens and 3) permanent that brings benefits to the citizens, but not immediately. If we apply this typology to both described cases, the Serbian cash transfers are again clearly temporary, while the Montenegrin tax reform would be permanent that brings immediate benefits to the citizens. Why is it important to make a clear distinction between permanent benefits that bring immediate impact to the citizens' standard of life and those that only show results in a long term? Well, simply because those with immediate impact have a higher probability of being used as a form of clientelistic relation for affecting voters' preferences. And those with no immediate impact, although not proof of a lack of clientelistic intentions, do have higher chances of being closer to

the programmatic kind of policies. As those policies do not bring immediate benefits to the citizens, they have a lower potential for being used as part of the vote-buying strategy, and therefore, could be an indicator of more serious, impact-oriented social policies aiming towards long-term sustainability.

In 2014 Italy introduced a transfer scheme that can be seen as similar to the Montenegrin programme, where employed persons were given approximately 80 dollars on top of their salary, through a series of tax incentives. Silvia Vannutelli implemented research which led to the conclusion that the program yielded significant electoral returns to the incumbent: a 1 standard deviation increase in the share of recipients (around 5% of the electorate) leads to a 3 percentage points' increase in the incumbent party's vote share, from a pre-treatment mean of 28 %. (Vannutelli, 2019, 25). Even though the program implemented in Italy was pragmatic and not clientelistic in regard to the eligibility rules, it was proven that it had significant impact on voters' behaviour. Vannutelli even found that the local mayors who were related to the incumbent party had actual electoral benefits from the introduced policies. And although there is no evidence to conclude that influencing voters was the primary goal of the programme in Montenegro it is highly likely that it will. It is important to mention that many international institutions such as IMF warned the Government about the riskiness of this programme and called for gradual and steady reforms where state would first try to generate the income and then to use it to subsidize for the employers' part of the health insurance, but the Government refused. Was the Government too eager to provide the Montenegrin citizens the long waited better standard of living or was it trying to generate large support just before the establishment of the new political party and its election participation, it cannot be said, but it is highly probable that the salary increase of 100% would incentivise a number of people to give their vote to the new party once it is established.

Conclusion

This paper presented critical assessment of some of the social policy measures implemented in Serbia and Montenegro in the recent period, in an effort to draw the attention to the social policies and welfare interventions being used as part of the clientelistic practices aiming to generate electoral support. Although the paper is based on the two countries, the conclusions can be applied to similar cases in other countries. The paper argues that there are at least two reasons that would affect social interventions being used as part of the vote-buying strategy more often. First one is existence of communist past as the long period of communist rule developed a set of norms and minimum expectations from the state in regard to social protection which are simply higher than in the other countries without that communist past. So, some measures of social protection which can be seen as over-regulation in other countries, will be seen as minimum requirements in the post-communist countries. Second reason is the absence of the strong ideological division among parties and the voters. Lack of consistent ideological behaviour by parties allows them to reach out for measures and actions that could be ideologically claimed by both right and the left side, without being politically

inconsistent. Equally, with voters not being clearly ideologically opinionated, parties can adjust their manoeuvres to the short-term, opportunistic and political goals instead of making sure that they are in line with the wider ideological principles.

Also, paper suggest that in today's world where policy choices are often driven by political pragmatism rather than the desire for the welfare of the people, it is wrong to attach any emphatic elements to the drivers on the social policy in the attempt of defining them. Rather, they should be defined based on the scope and the areas of intervention, as it is clear that they are often driven by narrow political interests.

All of these issues, as well as the socio-economic indicators show that there should be more attention focused on the development of the social policies in the Western Balkan countries and that has not been the case so far. Social policies have not been very high on the list of priorities of the European Union in the context of the accession negotiations, and even tough, there are initiatives towards higher social cohesion and economic empowerment, stronger pressures are lacking. Social policies have been more focused on by institutions and organisations such as World Bank and International Monetary Fund, but that was part of the more technical approach focused on macroeconomic, tax and fiscal policies. The presence and the influence of the European Union in the process of developing social policies could and should relate these issues with the topics of human rights, human capital development, fight against corruption and clientelism as well as the overall development of the more equal and just society, which all are priorities of the European Union. With or without the stronger pressure from outside, countries will need to find a way to start long-term and sustainable social policy planning and stop manipulating social interventions in order to generate votes, or the true welfare state will not be able to emerge.

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The COVID-19 Pandemic in Poland. Implications for Senior Policies

Abstract

The paper discusses the results of a review of governmental measures implemented in 2020 and 2021 to prevent the COVID-19 pandemic in Poland, in particular, the institutional and systemic solutions addressing senior citizens. The purpose of the paper is to answer primary research questions: a) can the initiatives put into action during the pandemic develop into new practices whose implementation is worth considering in the long term; b) does the experience gained during the pandemic help diagnose systemic failures or areas of senior policies that require new forms of management. The primary methodology used in the research was policy analysis, including an examination of policy outputs and policy outcomes, evaluative and normative analysis. A secondary issue discussed in the paper is a thematic analysis of public discourse, which leads to a conclusion that as the pandemic developed, the rhetoric used by decision-makers in respect of senior citizens changed – seniors became a social group perceived as deserving of care and support. The analysis is limited to the national Polish political and legal context. The research results in a comprehensive diagnosis of challenges facing senior policies, as well as recommendations for future solutions and directions of action.

Keywords: COVID-19 pandemic, senior policy, public management, crisis management, public discourse

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Introduction

The outbreak of the global SARS-CoV-2 coronavirus pandemic in early 2020 surprised political decision-makers, and the first attempts to control the spread of the virus bore the hallmarks of crisis management. The first case of COVID-19 in Poland was recorded on 4 March 2020; starting from that date, the Ministry of Health collaborated with the Chief Sanitary Inspectorate to implement a number of decisions aimed at protecting public health and ensuring the continuity of operation of the economy and public services. Implementation of a mask mandate, a so-called “hard lockdown” with restricted freedom of movement, suspension of business in some industries (food and drink establishments, gyms) and a temporary switch to online learning using IT technologies were only some of the governmental strategies put into action during the first year of the pandemic.

A meeting between the Ombudsman and representatives of the Expert Commission on Senior Citizen Affairs in April 2020 resulted in clear recommendations being issued in order to ensure care for the social groups that were most in need of assistance: “every effort must be made to reduce the impact [of the pandemic – author’s note] to a minimum to citizens of both genders. Senior citizens – those living alone, requiring assistance in everyday life due to their health or disability – are among those who are particularly at risk” (Rzecznik Praw Obywatelskich, 2020). The Expert Commission also made a reference to the provisions of Article 68 of the Polish Constitution, according to which “public authorities are required to provide special care to children, pregnant women, disabled people and senior citizens” (Constitution of the Republic of Poland, Article 68 Subsection 3) and “public authorities are obligated to combat epidemics” (Constitution..., Article 68 Subsection 4). Rhetoric used by the authorities in 2020 focused on underlining the significant importance of ensuring the protection of the elderly. Protection of senior citizens was presented as an expression of social, intergenerational and intrafamilial solidarity, as well as solidarity within local communities and between neighbours. Statements made by Łukasz Szumowski, the then-Minister of Health, consistently and repeatedly stressed the need of ensuring the protection of senior citizens against the negative and potentially hazardous consequences of being infected with the coronavirus. At a press conference held on 9 March 2020, Łukasz Szumowski stated: “Senior citizens are the most at-risk group when it comes to infection with the coronavirus. We appeal to the members of society to be particularly prudent in contact with the elderly, we must provide them with even greater protection” (Gazeta Wyborcza, 2020). Marlena Małag, Minister of the Family and Social Policy, also used rhetoric that stressed the need to protect seniors, giving the following statement for the Polish state television in October 2020: “Today we must clearly say: in these extraordinary times, with the coronavirus pandemic gaining momentum, our mutual solidarity will decide our fate, and, in particular, the fate of our senior citizens, our grandmothers and grandfathers” (Polska Agencja Prasowa, 2020). At a press conference in December 2020, Polish President Andrzej Duda noted as follows: “Many people find it hard to deal with being alone, they cannot cope with the situation and need support: the elderly and the disabled. The people for whom dealing with their day-to-day lives during the pandemic is a serious problem or simply a hazard to

their own lives” (TVP Info, 2020). From the perspective of social policy science and theoretical analysis of the development of senior policies in Poland, a shift towards pro-senior citizen rhetoric associated with the pandemic is a new and socially-desirable phenomenon after many years rife with gerontophobic attitudes, particularly in the area of social and cultural representation of old age. The shift towards the recognition of the needs of seniors, awareness of their situation and difficulties they face in their day-to-day lives associated with the pandemic has valuable potential and gives cause to reflect on the quality of the policy pursued in respect of senior citizens in Poland.

This paper is a part of a wider scientific discourse devoted to studying the social, political and economic consequences of the coronavirus pandemic in Poland and globally (Berkhout & Richardson, 2020; Hajder et al., 2020; Naumann et al., 2020; Piśula et al., 2020; Tisdell, 2020; Vezzoni et al., 2020; Altiparmakis et al., 2021; Długosz, 2021; Nowak & Szalotka, 2021; Ryan, 2021). The purpose of this paper is to review and evaluate the instruments and solutions implemented by the central government and local authorities during the pandemic to address the needs of senior citizens and reflect on the broader implications of the pandemic for senior policies in Poland. The theoretical research context of the paper is based on new institutionalism, in particular, its sociological and normative direction. The paper focuses on senior citizens as those to whom social policies are addressed. It discusses systemic solutions on a national and local scale. The paper conceptualises senior citizens as a vulnerable social group that deserves particular care and protection from the state (Brook & Jackson, 2020; Armitage & Nellums, 2020; Łuszczyńska & Formosa, 2021; Miller, 2021). The study is an innovative contribution to the debate on the political and social consequences of the coronavirus pandemic. Publications analysing the impact of the pandemic on social policy and policy in respect of senior citizens in Poland have been scarce so far. In the early stage of the pandemic, Bakalarczyk (2020) analysed issues similar to those tackled in this paper, focusing on the health- and non-health-related safety of senior citizens. Grewiński and Auleytnier (2020) discussed new social risks related to the pandemic. Topics related to the quality of life of senior citizens during the pandemic are tackled in reports of the Senior Citizen Policy Institute (SeniorHub, 2021). Numerous scientific studies, both Polish and foreign, discuss the area of public health (Szymborski, 2021; Rybarczyk-Szwajkowska et al., 2021). In the international context, research is focused primarily on the impact of social isolation on the elderly (Office et al., 2020; Oi-Yee Li & Huynh, 2020; Johnson et al., 2021).

The issues discussed in this paper include instruments and policies addressed to senior citizens implemented by the government and local authorities, and put into action during the pandemic between March 2020 and December 2021. The study does not analyse or evaluate actions taken by the social welfare and social work sectors. The paper is part of the field of applied sciences and is a valuable inspiration for authors of further strategies, recommendations and policy briefs.

Governmental initiatives addressed to senior citizens

Shortly after the outbreak of the pandemic, in the spring of 2020, the World Health Organisation announced that “although all age groups are at risk of contracting

COVID-19, older people face a significant risk of developing severe illness if they contract the disease due to physiological changes that come with ageing and potential underlying health conditions” (WHO, 2020a). Note was also made of the fact that the immune system of senior citizens is weaker. In response to the WHO’s recommendations, the Regulation of the Council of Ministers of 31 March 2020 introduced what is called “senior citizen hours” between 10:00 AM and 12:00 PM, during which only persons aged over 65 could receive services in retail and service establishments. The purpose of this solution was to limit direct contacts between senior citizens and people from other age groups. Although the initiative was controversial both among those to which it was addressed and other age groups, it was one of the first instruments directly aimed at improving the safety of senior citizens in the Polish public space.

The government’s decision to make vaccines available to the oldest age groups first was a direct manifestation of the privileged position given to seniors in the fight against the pandemic. As part of the National Vaccination Programme, people over 80 were able to schedule vaccination appointments starting from 15 January 2021, whereas vaccinations for people aged 70+ started on 22 January 2021. Simultaneously, the vaccination campaign for residents of care homes started on 18 January 2021. A 24-hour helpline of the National Vaccination Programme, available by calling 989, and an information campaign ran in traditional and electronic media under the *#SzczepimySię* (*#LetsGetVaccinated*) hashtag were practical components of the government’s actions.

In November 2020, the government launched the “Medical Care at Home” programme, addressed to people aged 55+ who tested positive for SARS-CoV-2. The programme was devised for middle-aged and senior citizens, who statistically are more likely to experience symptoms or serious symptoms of the disease. The main tenet of the programme was the automatic delivery of pulse oximeters to the homes of coronavirus-positive citizens aged 55+ by employees of the Polish Post, without having to submit any requests for the delivery. Using the pulse oximeter and the dedicated *PulsoCare* app, patients were then able to monitor their blood oxygen saturation on their own and transmit the results on an ongoing basis to a 24-hour Contact Centre. The Contact Centre can send EMTs to patients with concerning blood oxygen levels (Główny Inspektorat Sanitarny, 2020; Zapędowska-Kling, 2021). The programme is able to identify senior citizens, often living alone, whose health has suddenly deteriorated and refer them for hospitalisation. The pilot phase of the programme was implemented in the province of Małopolskie. Since 2020, it has been operating in the entire country. It is one of the few governmental programmes that combine health policy with the application of cutting-edge IT and communication technologies on a practical basis.

The COVID-19 pandemic contributed to the accelerated implementation of various telehealth solutions in Poland. In connection with having to restrict direct contact between people, a remote form of providing medical advice in the form of what is called “telehealth appointments” has become widespread. Legislation attempted to stay abreast of the new developments. Regulations of the Minister of Health of 12 August 2020 and 12 January 2021 gave official status to medical telehealth appointments and implemented specific stands governing their organisation (Zapędowska-Kling, 2021). Coincidentally with the outbreak of the SARS-CoV-2 pandemic, the electronic prescription system was launched in Poland at the start of 2020. The transition to

electronic medical documentation starting from January 2021 completed the process of implementing telehealth solutions in Poland. The Online Patient Account facilitates communication concerning coronavirus tests and quarantines imposed on citizens and allows the downloading of documents certifying recovery from COVID-19 (confirmation of convalescent status) and the so-called Covid pass. Senior citizens in Poland are encouraged to use telehealth appointments, and those suffering from chronic diseases are recommended to submit remote requests for electronic prescriptions. Remote forms of communication with employees of the health care sector are meant to minimise the risk of contracting the coronavirus in medical establishments. Telehealth solutions are particularly useful for geriatric patients suffering from multiple illnesses who require frequent medical consultations and constant review of the dosage of their medications. When discussing the usefulness of telehealth solutions, it is worth noting the pronounced digital divide among Polish seniors, which means that fewer people among the elderly than among other age groups possess technological competencies enabling them to use innovative solutions without assistance.

Another governmental initiative implemented during the pandemic was the Solidarity Senior Citizen Support Corps, a support programme for senior citizens aged 65+ coordinated by the Ministry of the Family and Social Policy. In organisational and structural terms, the programme is based on a network of municipal social welfare centres, whereas its implementation is mostly predicated on volunteers. As part of the Corps, a special helpline on (+22) 505 11 11 and the wspierajseniora.pl website were launched. The primary objective of the Corps is to provide senior citizens with various assistance in their homes. Support provided by the Corps includes assistance in daily activities such as doing the shopping, walking the dog, providing transportation to vaccinations, and taking care of formal matters. The programme was initially scheduled to run between October 2020 and December 2021. On 21 January 2022, the Ministry of the Family and Social Policy announced that the programme would be extended for 2022 and allocated PLN 80 million to the initiative. The Ministry also declared that the scope of the programme would be extended to include such elements as safety bands for senior citizens with fall detectors, alarm buttons and GPS trackers. The programme is also planned to be extended with a social component of support, namely, “volunteering initiatives that involve spending time with senior citizens” (Ministerstwo Rodziny i Polityki Społecznej, 2021). Other initiatives addressed at senior citizens, including, in particular, programmes implemented by local authorities, are discussed below in the paper.

Support for senior citizens organised on the local level

Many initiatives addressed directly at senior citizens were launched by local governments. Selected large urban agglomerations, such as Warsaw, Poznań, Kraków or Łódź, launched special initiatives in 2020 that made it possible for seniors living alone to receive shopping directly to their homes. Some local initiatives were organised as part of the governmental Solidarity Senior Citizen Support Corps programme mentioned above. For example, the Municipal Social Welfare Centre in Kraków launched

a special helpline in October 2020, where citizens aged 60+ could order deliveries of required hygiene and food products. To be able to receive the assistance, senior citizens had to live alone or with another elderly person or be disabled. Orders for the delivery of shopping were limited to PLN 100 and could be placed once a week. These limits enabled efficient services to be provided to many recipients simultaneously.

Before the Solidarity Senior Citizen Support Corps was launched, as early as during the first wave of the pandemic in March 2020, Łódź City Hall initiated the City Volunteering Service programme, with 165 volunteers registering to provide assistance. The volunteers provided help on 650 occasions (Kwiecińska, 2021). The second edition of the programme, launched in October 2020, involved 75 volunteers who assisted on 74 occasions (Kwiecińska, 2021). The programme was addressed at senior citizens, people suffering from chronic diseases and the disabled. The City Volunteering System was based on a catchment area system, thanks to which senior citizens requesting help were directly contacted by the volunteer registered closest to their address. Volunteers were issued special ID tags that enabled their identity to be verified and prevented potential fraud. Requests were taken via a special Call Centre Senior telephone line, open during the City Hall office hours from 08:00 AM to 04:00 PM from Monday to Friday and from 09:00 AM to 05:00 PM on Thursday (Kwiecińska, 2021). Other local initiatives included organising transportation to vaccination appointments for senior citizens who had to depend on the help of others. One example of a good practice in this area was the operation of district-based teams as part of the “Warsaw Supports” (Pol. “Warszawa Wspiera”) system. The teams were created pursuant to the Regulation No. 469 of the Mayor of Warsaw of 30 March 2020. The district-based teams were composed of “employees of district administration offices, Social Welfare Centres and local non-governmental organisations and their volunteers (over 580 people in total)” (Ochotnicy Warszawscy, 2020). Their primary task was to provide assistance to people dependent on the care of others who were unable to get help from their family or neighbours in their homes. Assistance in transportation to a COVID-19 vaccination appointment was available to people aged 70+ “who had objective and insurmountable difficulties in travelling from their homes to the nearest vaccination centre on their own” (Miejskie Centrum Kontakt, 2021).

The Senior-Wigor (currently “Senior+”) daycare homes for senior citizens also displayed creativity during the pandemic. During the high points of the pandemic, the operation of the homes was temporarily suspended to ensure the safety of the residents and the personnel. The Senior-Wigor home in Tuszyń focused on keeping in touch with senior citizens using the phone, with staff of the home calling each of their 20 residents every day. Necessary products, such as food, newspapers, crossword magazine, masks, gloves or even occupational therapy supplies were also delivered directly to the homes of those in the care of the daycare home. When the establishment was closed in the spring of 2020, employees of the senior citizen’s home in Tuszyń personally sewed masks, packaged them and delivered them to the homes of those in their care (Lasoń, 2022). After the homes were allowed to reopen, the number of events and trips organised for seniors was greatly reduced in comparison to the pre-pandemic times. The Senior+ home in Zbąszyń had an interesting idea. Thanks to the use of an interactive whiteboard available in the home, virtual trips were organised as

part of a “Hawaii week”, “Italian week” and “French week”. Films were shown on the whiteboard to complement lectures on the history and culture of selected countries, and on some occasions local delicacies were served to those in attendance. Many local Senior+ homes prepared an offer of online courses. In Wola Karczewska, an occupational therapy specialists hosted “Online cooking lessons” that discussed the rules of healthy eating. In Oleśnica, senior citizens prepared online audio plays for children composed of fairy tales and legends (MRiPS, 2020).

Local grassroots initiatives of a civic nature are also important. One such campaign with a national reach was the “Dog in Corona” (Pol. “Pies w Koronie”) support group active on social media, which provided assistance to owners of animals who were placed in isolation or quarantine. The group has over 100,000 members. The scope of help provided includes taking house pets on walks or transporting them to a vet in emergency situations where everyone living in a given household is placed in quarantine simultaneously. Assistance is provided free of charge and is based on the goodwill of volunteers.

Quality of life of senior citizens during the pandemic

Despite the multifaceted support offered by the state, local authorities and the third sector, prolonged stress related to the pandemic and restrictions imposed on the entire society had an impact on the well-being of the elderly. The report titled *Quality of Life of Senior Citizens in Poland in the First Year of the COVID-19 Pandemic*, published in April 2021, points to the concerning phenomenon of deteriorating mental health of senior citizens during the pandemic (SeniorHub, 2021). In a survey performed in February and March 2021 on a sample of 500 people aged 60 and over, 59.5% of respondents claimed that their mental health was worse than before the pandemic (SeniorHub, 2021). The subjective sense of reduced well-being among senior citizens was the product of several factors: a) reduced social activity, b) reduced number and frequency of face-to-face human interactions, c) reduced physical activity and recreation, d) fatigue with restrictions and limitations resulting from the pandemic, e) emotional stress, irritation and anxiety (SeniorHub, 2021). As noted by Karolina Lasoń, head of the Senior-WIGOR daycare home in Tuszyn, the physical and mental health of seniors in her care deteriorated during the three-month period in which the establishment was closed in 2020 (Lasoń, 2022). After the home was reopened and senior citizens returned to the establishment, the residents were seen to tire quicker, be sad, depressed, withdrawn and prone to excess worry. Those who previously required assistance of the staff in eating meals were seen to regress and cease any attempts to eat on their own (Lasoń, 2022). Senior citizens were afraid that the establishment, which plays a key role in providing them with support, activating and integrating them, would be closed again.

From an economic perspective, 2020 brought a deterioration in the financial situation of senior citizens. As noted by Bakalarczyk in a report prepared for Caritas Polska (2021), “in 2020, a year already marked by the tragedy of the pandemic, the number of people aged 65+ at risk of absolute poverty rose to 4.4% compared

to 3.8% in the preceding year” (2021, p. 21). The importance of this fact must not be underestimated, as “absolute poverty means teetering on the edge of possessing a minimum subsistence income, where difficulties may appear with satisfying even the most basic living needs” (Bakalarczyk 2021, p. 22). Furthermore, the pandemic affects the prices of consumer goods (Waniowski, 2021), which means that the purchasing power parity of pensions is reduced. In addition, other risks and hazards negatively impacting the quality of life of senior citizens during the pandemic include, but are not limited to, an increased prevalence of domestic abuse as a result of families being forced to stay in their homes due to lockdowns, as well as difficulties in satisfying consumer needs due to distribution and supply difficulties (Bakalarczyk, 2020). The suspension of various types of events organised in local senior citizen centres also had a negative impact on the mental well-being of the elderly. Prior to the pandemic, classes organised by local institutions traditionally played an integrating, activating, recreational and therapeutic role. Some of these classes were successfully reinvented in an online format, but the high rate of digital divide among the 65+ age group means that meetings and classes organised in the physical space are more effective. As stated in the latest report of the Consumer Federation, “3.63 million people aged 55–74 have never used the Internet. They are 80.4% of all the people who do not use the Internet” (2021, p. 29). The issue of mental health of senior citizens is systemically neglected and psychogeriatrics still does not constitute a separate medical speciality in Poland.

Mortality rate by age group

An increase in the mortality rate was observed in Poland during the pandemic. In 2020, the number of deaths was 477,355 and constituted an increase of 14.2% in comparison to 2019 (Statistics Poland, 2021). According to the Medycyna Praktyczna website (2021), on 11 December 2021 Poland was “placed second globally in terms of the absolute number of deaths – behind Russia, but ahead of the US, Ukraine or India (...). We are the smallest country among the top ten in this ranking (...)”. From the perspective of senior citizen policy, an important fact is that the coronavirus mortality rate rises as age increases. Data from January 2021 indicates that COVID-19 was the direct cause of death of 2.8 of people aged 50–60, 7.7% of people aged 60–70, 15.1% of people aged 70–80 and 22.6% of people aged over 80 (Statista, 2021). The Chief Sanitary Inspectorate indicates that the percentage share of the 70–79 age group in the total number of deaths caused by COVID-19 was 33% as of April 2020 (GIS, 2020). The above data shows that the phenomenon of excess mortality of senior citizens is present in Poland. The issue of excess mortality of senior citizens due to coronavirus is a key reason for implementing additional forms of protection in respect of this age group by the state. It is important to note here that an effective health care system and access to primary care physicians and specialists is of key importance in preventing excess mortality among seniors during the pandemic rather than the sum total of initiatives aimed at providing senior citizens with assistance during their extended isolation in their homes.

Other forms of support for senior citizens – examples from abroad

Although the pandemic-related challenges facing developed countries are essentially similar and methods employed by governments to counteract the risks are comparable, some forms of providing assistance to senior citizens are worth citing as examples of good practices from abroad. The US Meals on Wheels initiative, a wide-scale programme of delivering meals to the homes of senior citizens, co-funded by the federal government and private donors, resulted in impressive effects on an international scale. The programme has been present in the US landscape of services aimed at senior citizens since the 1950s, but it was the pandemic that resulted in the increase in the number of meals provided and other forms of contact with senior citizens. By July 2020, 19 million more meals were delivered as part of the programme in comparison to the pre-pandemic times. Over a million more new customers were serviced and more than 490.000 welfare calls were made to the homes of senior citizens. As part of the programme, over USD 31 million were transferred to 628 local branches (Meals on Wheels America, 2020). When compared to Polish municipal programmes of delivering meals to senior citizens, Meals on Wheels stands out specifically due to its scale and qualification criteria. The similar initiative implemented in Łódź was only a temporary substitute for those partaking in the services provided by day care homes in the period where these establishments had to be closed to sanitary restrictions. The number of people eligible for home deliveries of meals was 930 (Łódź City Hall, 2020). The US programme is permanent and universal – it is addressed at people aged 60+ who are unable to shop or prepare meals by themselves due to being physically challenged. The initiative is pursued in two ways: in the form of collective mess halls located in local senior citizen homes for those who can move around on their own, and in the form of delivering meals directly to the homes of those seniors who are unable to travel on their own. The extensive infrastructure of the programme and its many years of tradition enabled the initiative to flexibly adapt to the extraordinary circumstances of the pandemic. By July 2020, Meals on Wheels serviced 47% more senior citizens and handed out 77% more meals in comparison to pre-pandemic times (Meals on Wheels America, 2020).

Another programme implemented in Australia focuses on caring for the mental health of senior citizens and assisting in the quick delivery of medications straight to patients' homes. The Australian Red Cross launched a special website named Telecross, as part of which volunteer works make daily calls to those in their care, ask how they are feeling and whether they require additional psychological and emotional support. With financial assistance from the authorities, the Australian post offers free and express delivery of medications to local pharmacies (Australia Post, 2020). The service is addressed at people aged 70+, those suffering from chronic illnesses who must take medication on a regular basis and patients who go into isolation due to health considerations. One package weighing no more than 0.5 kg may be delivered as part of the free and contactless home delivery of medication (Australia Post, 2020). For comparison, in Poland the Polish Post collaborates with the Ministry of Health to deliver pulse oximeters to the homes of people aged 55+ infected with SARS-CoV-2 as part of the governmental Home Medical Care programme, described above in this

paper. Examples from abroad indicate that a still untapped potential exists for providing support to senior citizens in additional areas of their lives where state institutions have so far not been involved.

Experience of the pandemic and its implications for senior policy

In December 2020, the General Assembly of the United Nations declared that the years between 2021 and 2030 would be called the Decade of Healthy Ageing. The Department of Social Determinants of Health at WHO indicated that the UN's objective was to engage in international action for the improvement of the quality of life of older people and their families in these difficult pandemic times (WHO, 2020c). The WHO stressed that the COVID-19 pandemic had highlighted the seriousness of existing gaps in policies, systems and services addressed to senior citizens (WHO, 2020b). The purpose of this paper is not only to review the solutions of the government and local authorities addressed at senior citizens in Poland in 2020 and 2021, but primarily to supplement the governmental social policy strategy in respect of the elderly with priorities, recommendations and proposals of solutions that directly result from the observations made and experiences gained during the pandemic. A list of diagnosed issues is included below in Table 1.

The institutional long-term care sector in Poland was deeply affected by the negative effects of the pandemic. Reports in media in 2020 pointed to a concerning phenomenon of the rapid spread of SARS-CoV-2 infections among residents and staff in Social Welfare Homes, resident treatment and care homes and resident care homes. The pandemic shed light on numerous shortcomings of a systemic nature, such as staff shortages, falling number of qualified nurses, insufficient funding for the long-term care sector coupled with increasing costs related to compliance with sanitary requirements (Grzela, 2021). Preventing residents of care homes from contacting people outside the establishment, including family members and other relatives, was a concerning practice from the perspective of both senior policy and respect for basic human rights. The issue was so controversial that it drew the attention of the National Torture Prevention Mechanism, an institution subordinated to the Ombudsman.

In April 2021, representatives of the National Torture Prevention Mechanism performed an inspection at the Social Welfare Home in Gdynia to assess the actions taken in order to prevent the spread of the SARS-CoV-2 coronavirus. According to the report from the inspection, "persons spoken to during the inspection indicated that the inability to speak face-to-face with relatives was the worst consequence of the pandemic and restrictions imposed in its wake" (Krajowy Mechanizm Prewencji Tortur, 2021, p. 9). Other responses pointed to restrictions related to the residents' ability to temporarily leave the establishment and freely use the garden. Administration of the Social Welfare Home in Gdynia was given recommendations to familiarise the staff with the provisions of the Istanbul Protocol – an official document of the UN used to register and investigate cases of torture and other cruel, inhumane or humiliating treatment or punishment. The situation discussed above leads to a conclusion that similar restrictions caused by the pandemic were imposed on residents of all types

Table 1. Challenges to senior policy resulting from experiences of the COVID-19 pandemic in Poland. Proposed solutions and directions of action

No.	Challenges to senior policy resulting from experiences of the COVID-19 pandemic in Poland	Proposed solutions and directions of action
1.	<p>Area of residential long-term care</p> <p>a) staff shortages, b) increasing costs related to compliance with sanitary rules, c) ban on contacts between residents and persons from outside the establishment;</p>	<p>a) promotion of majors such as nursing, gerontology and long-term care, b) decent wages for nurses, improving the prestige of the profession, c) increasing spending on long-term care from public funds to the average value among the OECD countries of 1.5% of GDP (0.4% of GDP in Poland), d) a national programme of training for staff of inpatient care homes, based on the Istanbul Protocol and prevention of torture;</p>
2.	<p>Area of crisis management in fighting the pandemic</p> <p>a) negative attitude towards “senior citizen hours” in retail and service establishments, b) temporary closure of Daycare Houses and Senior Citizen Centres;</p>	<p>a) participatory model of creating social policies, b) using the end-user perspective in planning solutions, c) systemic evaluation of implemented solutions, d) activation of senior citizens using the hybrid technique (physical events + online events as an alternative), e) constant contact with those in the care of the homes through telephone calls, online messengers and video calls;</p>
3.	<p>Area of adult education</p> <p>a) reduced interest and attendance in the University of the Third Age (U3A) community, b) social and mental burnout of leaders of the U3A community, c) chaos caused by the absence of a national coordination system in the area of adult education;</p>	<p>a) promoting hybrid forms of education (physical and online as an alternative), b) organising professional mental counselling and coaching sessions for U3A coordinators, c) creating a centre for the coordination of the adult education system in Poland at the Department of Senior Citizen Policy or the Ministry of Education and Science;</p>

Table 1 – *continued*

No.	Challenges to senior policy resulting from experiences of the COVID-19 pandemic in Poland		Proposed solutions and directions of action
4.	Area of the health care system	a) high mortality rate among senior citizens, b) deteriorating mental health among senior citizens, c) difficulties in accessing medical services (digital divide);	a) giving priority to ensuring physical access to primary care physicians for people aged 65+ and promoting screening tests among senior citizens, b) increasing the number of geriatric doctors per 1000 inhabitants in Poland, including psychogeriatrics specialists; designating psychogeriatrics as a separate medical speciality, c) education on telehealth services on municipal level, training courses in the use of electronic bands and other e-health applications;
5.	Area of the economy – supply and demand in the goods and services market	a) reduced purchasing power of pensioners / phenomenon of poverty among senior citizens, b) difficulties in the availability of goods and services during the pandemic;	a) preventing loneliness among the elderly, promoting co-living solutions for single-member households, b) planning professional careers and life-long economic activity based on the life cycle perspective paradigm, c) inclusion of compulsory basic education in economy in school curricula, d) offering training courses for senior citizens in safe online shopping and meeting their consumer demands through mail order sales.

Source: own compilation.

of inpatient care establishments and that training for staff should be of a systemic and not incidental nature. Content available on the website of the Ombudsman's Office may constitute training material and a reference point for acting in accordance with international standards of respecting human rights.

The beginning of the pandemic, which occurred in March 2020, required a quick response from the government as part of crisis management actions aimed at protecting the life and health of the citizens of Poland. One of the first solutions implemented were the aforementioned “senior citizen hours”, a period during the day set from the top

down when only people aged 65 and over could use retail and service establishments. As it turns out that in retrospect, the social perception of this solution has been mostly negative. A survey performed in February 2021 on a group of 923 respondents indicated that over 50% of people had a negative opinion on the implementation of “senior citizen hours”, with women and young people being the majority of those who had a “definitely negative” opinion of the programme (Podhorecka et al., 2021). The Polish Chamber of Commerce also chose to defend the interest of businesses and spoke against this solution. The controversies surrounding the “senior citizen hours” give rise to several conclusions. First, when creating public policies it is a good idea to apply the participatory model by inviting those to whom the programmes and strategies are addressed to consult on and participate in the creation of the proposed solutions. It is important for any programmes implemented to account for actual issues and needs of their target groups (Zapędowska-Kling, 2018). Second, the specific nature of the “senior citizen hours” implemented in Poland brings to mind a certain “ghettoisation” of the elderly, a form of segregation that in consequence may deepen negative stereotypes and social exclusion of senior citizens. Third, restricting access to retail stores to young and middle-aged people exacerbated gerontophobic opinions and attitudes, neatly fitting into the discourse of “intergenerational conflict” (Binstock, 2010; Urlick et al., 2017). It is worth noting here that the solution implemented by the government had numerous systemic defects and errors that required quick rectification. “Senior citizen hours” applied to school shops and canteens, which are not used by people from the 65+ age groups, as well as petrol stations, where customers are mostly drivers of working age. Perhaps a better solution would be to give positive privileges to senior citizens without preventing other age groups from accessing goods and services, e.g., by designating “priority checkouts” for the elderly or giving senior citizens the priority of service in selected health care establishments and pharmacies.

Similarly to other countries, Poland experienced a temporary crisis of the health care system as a result of the pandemic, which primarily manifested in limited access to medical services. On the one hand, the pandemic brought a long-awaited progress in the area of implementing telehealth solutions. On the other, it laid bare the multifaceted consequences of digital exclusion of senior citizens, who were deprived of traditional channels of communication with physicians overnight, and did not always have access to equipment or knowledge enabling them to use e-prescriptions, e-referrals or e-diagnostics. Although the government’s *Social Policy in Respect of Senior Citizens 2030* strategy sufficiently stresses the need of implementing new technologies in telehealth and telecare, the experience of the pandemic indicates that a large-scale campaign providing education in using telehealth services is required. Such training courses are only incidentally provided on the local level. A good example of such an initiative is the city of Wrocław, which implemented a project involving the provision of training in the use of telehealth services in collaboration with company Telmedicin Sp. z o.o., addressed to holders of Senior Citizen Cards issued by Wrocław authorities (Wrocław.pl, 2021). As part of the project, seniors attended meetings in the physical space, arranged by telephone, and learned how to operate telehealth equipment used to remotely measure vital signs (e.g. pulse oximeters) and how to connect with a physician for an online telehealth appointment (Stasiak, 2021). Although the promotion of telehealth

solutions (e.g. popularisation of wrist bands for senior citizens) forms part of the Polish senior citizen policy until 2030, the experience of the pandemic shows that it is worth focusing on bringing knowledge to underprivileged groups. It is important to run informational campaigns using traditional channels (posters, leaflets, press adverts, and silent marketing) with the participation of local Senior Citizen Centres, including in rural areas. The creativity of the “silver economy” sector may also be of assistance, namely, by promoting the manufacture of competitively-priced devices with software enabling the simultaneous fusion of several functionalities, e.g., a phone with a built-in application for contacting a physician, receiving e-prescriptions, managing an e-wristband or making video calls to callees specified by the senior citizen.

Apart from social, health, economic, demographic and humanitarian challenges, the pandemic let loose a hitherto unknown potential of volunteering initiatives and civil society, giving rise to hope for a lasting strengthening of hyperlocal ties and self-help initiatives. Conditions in the new post-pandemic world are conducive to the promotion of concepts such as time banks and regional support groups, which increasingly frequently use online messengers and social media in addition to traditional forms of contact. From this perspective, the Polish Senior Citizen Activity Programme (known as Aktywni+ since 2021), which delegates activities aimed at activating seniors to non-governmental organisations through the transfer of funds, can be seen as successful. The experience of the pandemic has shown that grassroots initiatives may constitute a valuable lesson and source of inspiration for governmental institutions responsible for social policy and policy in respect of senior citizens. Collaboration between the public sector and the third sector, and local entities would appear to be a desirable direction of development. Local and non-governmental organisations often act as incubators of social innovation.

The temporary lockdown and closing of many cultural and educational establishments in 2020 drew attention to the issue of a lack of coordination of the adult education system in Poland. In late 2021, the “e” Association of Creative Initiatives in collaboration with the Polish-American Freedom Foundation published a report on the situation of Universities of the Third Age (U3A) during the pandemic. According to the report, fear of COVID-19 caused many students to withdraw from U3A communities and permanently loose contact with them. The report points to the limited effectiveness of online means of communication among people aged 80 and over – such people “did not attempt to use digital tools and were not interested in gaining knowledge without personal contact. Online classes are neither appealing nor available to the oldest students. Exclusion may be caused by institutional barriers or individual motivations” (TIT “e”, 2021, p. 12). According to the report, the elderly need communities of their peers and intragenerational ties particularly in times of uncertainty and anxiety related to the pandemic. Attempts should, therefore, be made to organise smaller-scale meetings in open air (e.g. lectures and panels in parks, squares, as well as urban spaces), and, simultaneously but not exclusively, using digital media. The report unequivocally stresses that “when creating programmes, greater emphasis should be placed on promoting activities educating and raising awareness on the importance of the peer group for the well-being of the individual” (TIT „e”, 2021, p. 30). At a session of the Expert Commission on Senior Citizen Affairs at the Ombudsman’s Office

held on 14 January 2022, it was recommended to engage in efforts preventing the social and mental burnout of leaders of Universities of the Third Age. Attention was also drawn to the need for creating a centre tasked with coordinating adult education in Poland, which has not been set up to this day (Starzewski, 2022).

The pandemic highlighted the phenomenon of poverty among senior citizens and contributed to the falling purchasing power of pensioners, simultaneously restricting access to selected goods and services. Although the issue of financial security of senior citizens is a challenge of a strategic and long-term nature and begins with providing basic education in the field of economy for young people entering the job market, the experience of the pandemic has highlighted the difficult situation of senior citizens who live alone. From this perspective, considerations on the promotion of solutions in the area of co-living, a new trend in housing where two or more senior citizens decide to live in a single house, each having a separate bedroom but sharing the costs of living and providing mutual support to each other as housemates, take on a new meaning. Co-living is a phenomenon consistent with a wider trend of the sharing economy, an economy based on bartering. Experience of the pandemic indicates that further analysis is needed of consumer behaviour in various age groups for whom “letting go of owning things in favour of consumption based on access” (Kamińska, 2017, p. 165) is becoming a natural choice. In addition, the difficult financial situation of senior citizens is a catalyst for a discussion on the need to redesign the traditional conception of the working age of future generations, which may be able to plan their professional careers with greater flexibility and better control over their own resources, based on periodic switching of roles and lifelong learning according to the life cycle paradigm.

Axiological dimension of the pandemic

Aside from its numerous implications for social policy, an important consequence of the pandemic was its impact on the value systems of individuals and societies (Długosz, 2020; Papciak, 2021; Siewiora, 2021). From the point of view of public management, the pandemic was an experience of crisis, and reactions of governments to the threat posed by the epidemic bore the hallmarks of crisis management. Crisis as a landmark occurrence in the life of a person may cause individuals to reassess their values in the philosophical, psychological, health-related, social, economic and professional dimension, and even in terms of their identity (Skłodowski, 2010). As a result of the experience of the COVID-19 pandemic, human life and health became overarching values (Gočko, 2020). From the perspective of ethics and theology, responsibility for life and health is one of the main tenets of social life and an important component of the “common good” (Gočko, 2020). The axiological dimension of the pandemic had a direct impact on the priorities of the government and its crisis management, particularly during the first months of the pandemic. Imposing a “hard lockdown” and placing seniors under particular protection was caused by the concern for the health and lives of citizens. From the perspective of senior policy, it is important to strike a balance between caring for the elderly and risking excessive medicalisation of old age. The phenomenon of medicalisation is sometimes described as a tendency

for a certain “multiplication of illnesses” or “overmedicalisation” of various spheres of human life (Nowakowski & Nowakowska, 2014; Sokołowska, 1980). Medicalisation of old age involves giving undue prominence to the biological, bodily and health-related changes that occur in the human body with the passage of time. Research on the quality of old age and the ageing process focuses on promoting the “positive ageing”, not necessarily tied with a reduced quality of life (Steuden et al., 2016; Zadworna-Cieślak & Finogenow, 2012; Zapędowska-Kling, 2010). In the context of the COVID-19 pandemic in Poland, numerous references were made to the reduced ability of the immune systems of seniors to defend against the virus, in a way persuading the elderly that they were more susceptible to being infected. This rhetoric was used as the basis for imposing numerous limitations on the everyday lives of senior citizens. In addition, the rhetoric related to the pandemic fits with the concept of structured dependency of senior citizens, described in scientific literature of the 1980s and criticised by social gerontologists as systemically taking away the right to self-determination of the elderly (Townsend, 1981). In light of these observations, the participatory method of creating social policies with the active involvement of senior citizens during the stage of both designing and evaluating social programmes and strategies put forward in this paper takes on added importance.

Summary and conclusions

The coronavirus pandemic that has been ongoing in Poland and the world for two years now is a valuable lesson for social policy makers. The review and assessment of initiatives addressed at seniors implemented by the government and local authorities lead to important conclusions. First, the experience of the pandemic has freed the potential of civil society and taken the form of numerous and inventive activities on a local and hyperlocal scale. Neighbourhood support groups, organised volunteer corps, and businesses providing assistance without expecting anything in return are only some of the examples of spontaneous grassroots involvement. It turns out that social policies and senior policies still have room for charity and exchanges of services based on the concept of time banks. Second, the unexpected outbreak of the pandemic contributed to an accelerated popularisation of new technologies, both in the area of telehealth and social communication. Keeping in mind the imperfection of online forms of social services resulting from limitations of the technology used to provide them, it bears noting that in the future both online learning and online medical appointments may constitute a valuable addition to traditional forms of communication, in particular, taking into account the circumstances of social groups who experience difficulties in moving around, such as disabled people with motor dysfunctions or senior citizens dependent on others. In addition, many forms of activation of senior citizens taking place in the physical space on the local level were moved online or switched to hybrid mode during the pandemic. It would be advisable to consider implementing online courses on a permanent basis, as there are those who could benefit from them. Before the pandemic, activities aimed at activating older people in Poland were primarily addressed to senior citizens who were healthy and could move around on their own. Wanting to ensure the integration of senior citizens in conditions

of social isolation, senior citizen centres were able to seamlessly transition to online communication platforms. In the future, physical and hybrid forms of activation should complement each other. Third, the pandemic has demonstrated that the Polish society is capable of intergenerational solidarity. The pro-senior citizen rhetoric of the government reinforced the message carried by the media, characterised by respect and care for the safety and health of the elderly. In many municipalities young people delivered shopping and medications to senior citizens. Success of the Solidarity Senior Citizen Support Corps resulted in an extension of funding for the programme for 2022. From this perspective, it appears advisable to continue the promotion of intergenerational programmes and strategies, aimed at ensuring integration and exchange of potentials and experiences.

On the other hand, the pandemic laid bare a number of systemic defects and weak points, demonstrating the need for further reforms and actions. Having to comply with sanitary requirements was a challenge for the Polish residential long-term care sector, which struggled with staffing, financial, organisational and health-related problems – social welfare homes and other establishments frequently became locations of outbreaks of COVID-19. The social isolation policy constituted an additional challenge, as it prevented residents of care homes from being visited by family members and friends. The sum total of difficulties experienced by employees of the long-term care sector points to the need for thorough, systemic reforms, both in the area of funding and organisation of work. Popularisation of the telehealth model and – where possible – transition to home- and community-based services may improve the situation to a slight extent. However, none of these solutions appears to be realistic without increasing funding for long-term care from the state budget, which in Poland is currently among the lowest among OECD countries.

Another important consequence of the pandemic is the deterioration of mental health of senior citizens and representatives of other age groups in Poland. Reports in the media paint the picture of a collapse of psychiatric care in Poland, in particular, for children and young adults. Promoting 24-hour mental health hotlines, which are often coordinated by the third sector, might potentially be a worthwhile course of action. Many municipalities in Poland currently operate their own mental health hotlines for senior citizens with a local reach. Telephones are manned both by qualified psychologists and volunteers. The government's decision to cease funding for the Mental Health Hotline for Children and Young Adults was an incomprehensible and lamentable decision. The recommended course of action in this area is to increase the number of geriatric doctors and psychogeriatricians in Poland and designating psychogeriatrics as a separate medical speciality.

Another negative result of the pandemic was the disruption of the operations of Universities of the Third Age, which includes the declared fall in motivation among both students and leaders of adult education establishments. The recommended solution is to set up a centre responsible for coordinating the adult education system in Poland at the Department of Senior Citizen Policy or other adequate government institution.

Summing up, as put by Carr, Boerner and Moorman, “unprecedented challenges demand novel interventions” (2020, p. 425). The coronavirus pandemic was an unprecedented challenge for social policy makers, and made senior citizens the addressees of numerous innovative programmes and forms of support (Miller, 2021). In the future,

it will be worth focusing on improving the quality of mental health care for Polish citizens, as the psychological and emotional consequences of the pandemic will be long-term. From the axiological perspective, managing the state budget should reflect the changes that took place in national value systems during the pandemic, with issues of safety, human life and health being moved to the fore.

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Prof. Jolanta Supińska – wspomnienie (1 marca 1944–31 stycznia 2022)

Kim powinien być polityk społeczny? „Według mnie to powinien być człowiek sprzeciwu, człowiek buntu, który potrafi krytycznie spojrzeć na zastaną rzeczywistość. Z kolei w tym sensownym buntowaniu się powinna mu pomagać jego wiedza naukowa i życiowa. I jeszcze konieczna jest taka aksjologia, która jest korzystna dla maksymalnej liczby bytów, które go otaczają” (cytat za: Grewiński & Karwacki, 2019).

Profesor Jolanta Supińska, Jola była osobą szczególną. Pamiętamy ją jako osobę życzliwą, ciekawą świata i wrażliwą na krzywdę ludzi i zwierząt. Osobę, która buntowała się i chciała zmieniać świat, aby był lepszy i bardziej sprawiedliwy. Pamiętamy ją jako uczoną, która podejmowała najtrudniejsze tematy polityki społecznej, czyli jej uwikłanie w spory między najważniejszymi wartościami życia społecznego.

Jesteśmy Ci wdzięczni, Jolu, za twój wkład w tworzenie nauki o polityce społecznej na Uniwersytecie Warszawskim. Za kultową książkę *Dylematy polityki społecznej*, która wyznaczała nowe perspektywy dla dyskusji o tym obszarze nauki i praktyki. Było to spójne, dobrze uzasadnione i realistyczne stanowisko, które można uznać za solidny fundament do budowania humanistycznego ładu społecznego. Gdy przeglądałem tę książkę w 2014 r., aby napisać wstęp do nowego wydania, byłem znowu pod wrażeniem, jak wiele ujętych tam zagadnień było później rozwijanych w teorii i praktyce światowej, np. behawioralna polityka społeczna.

Żegnamy piękną osobę i wspinałą uczoną. Będziemy pamiętać o tobie Jolu i o twoim dziele w naszym życiu i pracy.

Jolanta Supińska ukończyła studia ekonomiczne na Uniwersytecie Warszawskim w 1966 r. Pracę magisterską o polityce płacowej i nierównościach płacowych napisała na seminarium prof. Zofii Moreckiej. Doktorat pt. *Jugosłowiańska strategia społeczno-gospodarcza a zróżnicowanie warunków bytu narodów Jugosławii* obroniła w 1974 r. Promotorem był prof. Jan Danecki, jeden ze współzałożycieli Instytutu Polityki Społecznej na Uniwersytecie Warszawskim. Stopień doktora habilitowanego uzyskała na podstawie rozprawy *Dylematy polityki społecznej*, obronionej w 1989 r., a tytuł profesora zwyczajnego przyznano jej w 2015 r. Pod jej kierownictwem obronionych zostało sześć prac doktorskich.

Rozprawa habilitacyjna została opublikowana w 1991 r. i była to praca przełomowa – w tym sensie, że powstała i została ukończona w okresie upadku systemu socjalizmu realnego i wydana, gdy zaczęła się szybka budowa nowego ustroju. Przełomowość tej pracy polegała też na tym, że poruszała najważniejsze zagadnienia polityki społecznej w ujęciu aksjologicznym i instrumentalnym. Łączyła tym samym podejście oparte na wartościach typowych dla filozofii politycznej z charakterystyczną dla nauki o polityce społeczną orientacją na instrumenty zmiany ludzkich zachowań. Sformułowane w książce dylematy zostały umiejętnie rozbrojone i rozstrzygnięte z umiarkowanych i realistycznych stanowisk, które razem stanowiły solidną podstawę dla budowania humanistycznego ładu społecznego.

Spośród wielu funkcji, które pełniła, należy wspomnieć, że była członkinią Prezydium Komitetu Nauk o Pracy i Polityce Społecznej Polskiej Akademii Nauk, przewodniczącą Rady Społecznej przy Prezesie Rady Ministrów, członkinią Rady Konsultacyjno-Programowej przy Pełnomocniku Rządu do spraw Równego Statusu Kobiet i Mężczyzn, redaktorką naczelną czasopisma naukowego „Problemy Polityki Społecznej. Studia i Dyskusje”, a także członkinią Rady Redakcyjnej serii wydawniczej „Biblioteka Pracownika Socjalnego”.

Brała też aktywny udział w życiu politycznym jako członkini Unii Pracy (kandydowała do Parlamentu Europejskiego w 2009 r. z list SLD), a także w wyborach do Rady m.st. Warszawy (startowała z list Komitetu Wyborczego Jana Śpiewaka „Wygra Warszawa”). Była wegetarianką i sympatyczką Partii Zieloni, brała udział w wielu akcjach na rzecz obrony praw zwierząt.

W imieniu Redakcji
Ryszard Szarfenberg

Literatura

Grewiński, M., Karwacki, A. (2019). *Portrety w polityce społecznej. 1.* Polskie Towarzystwo Polityki Społecznej.

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