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From underclass to *Homo sovieticus*: Human constraints towards modernization

This article aims to present the discursive processes that were used to justify the path chosen to implement the social and economic transformation to capitalism in Poland. Special attention is paid to the role of elites in shaping a public discourse which legitimized the significant pauperization in society and growth of income inequalities as being conditioned on individual defects and the "civilizational incompetence" of those at the bottom of the social structure. These citizens of Poland were presented as a constraint and obstacle to achieving a faster pace of modernization processes. This has influenced the thinking of politicians involved in policy-making at the national level, as well as the attitudes of those involved in the implementation of welfare measures at the local level. Furthermore, it has contributed to the unspoken consensus of all mainstream political parties over the neoliberal reforms in the economy and social policy.

Keywords: *Homo sovieticus*, elites, Poland, postcommunism, discourse, socio-economic transformation, modernization

Introduction

The way of addressing and describing the topic of poverty, exclusion and inequality in public debate are important factors which impact on the image of the poor in the public eye.[1] In the age of tabloidization, the attributes attached to poverty in scientific and political debates are "filtered" by the media and become useful and commonly accepted clichés used by both the elites and general public, which consequently can determine the scale and quality of actions undertaken for the sake of the poor. Wim van Oorschot, who studied these interrelations and the views on the 'deservingness' of various social groups, recalls that: "Already in 1908, George Simmel argued in his essay, 'Der Arme', that the generosity of poor relief generally depends on the degree to which the poor are blamed for their own misery" (van Oorschot 2007, 130).

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The triumph of the meritocratic approach to social mobility and technocratic attitude to policy-making grants a special position to the well-educated elite in the process of setting up the public agenda, and hence prescribing the legitimacy and importance of certain themes. It is also visible that the language and discursive practices used by the most prominent and recognized members of the elite via mass-media become dominant in the public sphere. This article is aimed at presenting some of the specificities of Polish public discourse during the transition period, with special stress put on the role of intellectuals. The paper is structured around the following issues:

1. Taking as a reference point the American debate about the 'underclass' that paved the way for neoliberal reforms in the late seventies and the eighties, I argue that similar processes were visible in the public discourse in Poland during the transition period.
2. The members of intellectual circles played an important role in justifying the neoliberal reforms and providing them with intellectual legitimacy. They, being the "winners of transformation" almost unanimously supported the direction and the "technology" of implementing economic and social changes. A certain stratum of Polish society has been defined as a constraint to achieving the economic success and modernization of the country, also being perceived as an obstacle to further development and modernization.

1 The author wishes to express his gratitude to three anonymous reviewers and two well-known editors for their comments and remarks, which helped improve the paper.

3. As the results of the PROFIT project carried out by the sociologists from the University of Łódź showed, this kind of discourse about transformation has gained significant support among all those involved in the process of formulating social policy, as well as among local elites and persons responsible for the implementation of social policy measures and the day-to-day functioning of welfare services.
4. The dominant discourse has contributed to the ideological chaos on Polish political scene, where traditional left-right labels are no longer valid descriptions of the stances of main political parties. What's more, while in office all of them followed the neoliberal path of transforming the economy and making policy, which was the only one legitimized by the elites.

This paper follows the tradition of critical studies over the discursive construction of social issues as presented in the works of Katz, Gans, Bauman or Wacquant, who combine their analysis of the discursive practices imposed by the elites and intellectuals with the factual, empirical verification of their claims.

It is also inspired by the discourse studies as presented by Teun van Dijk (2004, 2006, 2008, 2011) in his works on the discourse of power, ideology and inequality. Thus, discourse is seen here in a broad perspective as an elite-driven communication. The approach of van Dijk requires that particular attention be paid to the way social groups, their attitudes and opinions are influenced by the elite-driven discourse, which contributes to establishing, shaping and maintaining the social relations of power, domination and exploitation. It needs to be underlined that this short contribution, combining data from various sources, does not aspire to precisely follow the methodology of Critical Discourse Analysis, nor to contribute substantially to the existing body of theoretical debates. This is rather a modest effort to discuss some of the discursive practices in context of existing statistics and empirical data produced for the purpose of critical research into the Polish public discourse.

Modernization is understood here in rather narrow terms, without attempting to add to the long-lasting philosophical debates on its nature and meaning. In this paper, it is operationalized according to the most common understanding of this concept since the early phase of the post-communist transition. From this perspective, modernization refers to the process of progressive development towards the standards of Western democratic states, and economic transformation into a market-based economy according to the principles of the dominant neoliberal creed

(see for example: Grancell, ed. 1995).[2] 'Catch-up modernization', presented as an attempt by the peripheries to move closer to the core of the "modern" world was, for many of its proponents, synonymous with the neoliberalization of economy and privatization of social relations, as well as with radical retrenchment of the state away from large areas of social responsibilities. At the same time it was the creative destruction of the existing institutional setting and social order, which was supposed to bring Poland closer to the imagined Western standards.

The first two subchapters are intended to introduce a comparative element to the debate on the "underclass", i.e. to present it in an American context and in its Polish equivalent, that is the *Homo sovieticus* debate. The subsequent parts constitute the empirical foundation of the paper. Excerpts from the works of prominent scholars (particularly by Piotr Sztompka) serve here to illustrate the aforementioned elitist and intellectual discourse introduced by the ideologists and pacesetters of neoliberal modernization.

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The approach in this paper is also inspired by decades-old reflections surrounding the contemporary role and significance of social scientists, particularly in reference to both their explicit (via political engagement) and implicit (via the façade of expert neutrality) involvement in the agenda--setting which legitimizes the social order they benefit from. The argument here follows the diagnosis of Immanuel Wallerstein, who claimed (1997, 1250) that the

> early hopes of social scientists that they could be modern philosopher-kings proved totally vain and social scientists settled into being the handmaidens of governmental reformism. When they did this openly, they called it applied social science. But for the most part they did this abashedly, asserting that their role was merely to do the research, and that it was up to others, the political persons, to draw from this research the conclusions that seemed to derive from this research. In short, the neutrality of the scholar became the fig-leaf of their shame, in having eaten the apple of knowledge.

Underclass under surveillance – the American case

Michael B. Katz (1989), Herbert J. Gans (1995) and Zygmunt Bauman (1998) devoted some of their work to elaborate on the American debate

2 For a brief critical discussion on the topic of "modernization losers" in the Polish context see: Czyżewski 2013: 6–8.

on the "underclass". This term is sometimes understood as a purely descriptive notion, supplementing the existing vocabulary of stratification studies. However, as Zygmunt Bauman claimed in his essay entitled "Amazing career of underclass", there were various indirect semantic strategies used by those who contributed to the worldwide recognition of that term. He also notices that the discursive and ideological usage of this term was very far from what was meant by Gunnar Myrdal in his works on the lowest strata of the society: "It is not the members of 'underclass' who ignore norms of the society; it is society that turns its back at them" (Bauman 1998).

Bauman goes on to explore the contemporary meaning of the term, which refers to the category of people who are located not at the bottom, but *outside* the social hierarchy, who are unable to offer anything useful to the society, therefore justifying their exclusion. What is fundamental to this understanding of the "underclass" is the notion that the becoming a member of this category is a matter of individual choice: "purposeful and active, or indirect, via omission; it is the choice even when one found himself in the underclass, because he failed in his attempts to get out of the poverty (which he should – and implicitly – was capable to undertake)" (Bauman 1998). Both Bauman and Gans draw attention to the crucial role of mass-media in popularizing the new way of describing social problems and stigmatizing those at the bottom of the social ladder. They underline the special role of the cover story of TIME magazine published on the 29th of August 1979, which impacted on the public image of the lowest strata of American society as an alienated, defiant, and dangerous minority. Altogether the combination of teens playing truants, pimps and prostitutes, lone mothers, beggars and drug addicts constituted the amorphous group labelled as the 'underclass'. This flexible notion became a very useful tool for directing the fear and anger of the social masses towards those who could become perfect scapegoats and be blamed and punished for various, if not all, social problems. The American Dreamers could easily believe in the real threat they constituted to their safety and the obstacle they posed for the further development of the society and the economy. The most important characteristics of this stratum referred to a pathological predisposition toward delinquency, weak family ties, high frequency of divorces, lack of traditional values defining family roles and, above all, an attitude of entitlement towards the state and a corollary lack of motivation to work, which hampered economic growth and weakened the finances of the state due to welfare spending. The political consequences of this stigmatization are well recognized. The arguments proving the universal nature of the individual's responsibility

for his or her fate were very important in building the capacity for the elitist consensus and the middle class indifference to the 'Reaganomics' in the eighties.

Loïc Wacquant (2009a, 2009b) points out the particularly influential role played by conservative intellectuals in spreading anti-poor beliefs, negative attitudes regarding poverty, and promoting a strict penal policy in the American context through the tremendous work of think-tanks like the Heritage Foundation, CATO Institute, Manhattan Institute and RAND Corporation, paving the way for neoliberal solutions in the spheres of social policy retrenchment and the incarceration of poverty. Wacquant also elaborates on similar processes influencing public attitudes and justifying pro-market reforms which have been visible in Western Europe since the nineteen-eighties. I argue that the same processes, but on even a larger scale, transpired in the reality of the transforming post-socialist societies, and that they had a huge impact on the newly-emerging political scene, as well as the agenda of public discourse. At least in Poland, they did not meet any significant opposition in the intellectual elites and were hardly noticed in the international intellectual and scientific circles.

East European pathway towards capitalism

Providing a short sketch of the well-recognized story from the other side of Atlantic seems important to establish a reference point from which to present the Polish case. The Polish intellectual elite, including scholars with a social studies' background, once constituted the *intelligentsia*, a specific social group possessing a unique ethos and playing a crucial role in reproducing Polish patriotism and Polish national values during the years of partition. The *intelligentsia* was perceived as a repository of national consciousness throughout the partitions of Poland, and subsequently under German occupation and Soviet dominance. This uniquely East-European social stratum was also characterized by a high level of concern for those at the bottom of social ladder, as well as for the well-being of ethnic or religious minorities. The unity of the society and the joint responsibility for the common good were among the crucial features of this ethos (see: Gella 1989; Zarycki 2009, 2003).

The fall of the communism and the transition to a market economy also marked the beginning of the end of this social group in its traditional form. As most of the social structure analysts have shown, Poland witnessed the birth of new strata in its post-socialist reality: the middle class.

Hanna Palska claims that the ethos of intelligentsia is in fundamental conflict with the ethos of middle class (2009). Profit-driven work and individualism replaces selfless engagement in the public sphere and the sense of belonging to a wider community. Members of academia were among those who quickly became some the most determined success-oriented representatives of the new class. The economic transformation offered an unprecedented opportunity for achievements, including in material terms. The huge sector of private tertiary education, with more than three hundred academies-enterprises, has been established by those who did not go to work in the business sector, policy-making or, in the case of social scientists, in the polling and marketing industry. This constituted a massive change after the years of lagging economically behind the communist *nomenklatura* and sometimes even behind the working class elite. During the last decade of Polish People's Republic university graduates, even though scarce in number, were earning just 14% more than the national average, while a significant share of population with primary education were earning only 10% below the mean income (Domański 2002).[3] The beginning of the transformation was a real success story for academia, with the most rapid growth of tertiary enrolment in Europe and a blooming sector of private tertiary education. Education was seen as a "truly universal remedy for most of the negative effects of rapid social change. The more educated one is the quicker and more efficiently one adjusts to the new rules of life" (Czapiński 1996, 299).

This differentiation of social structure in Poland, conditioned on access to high-quality education, has been growing (see: Słomczyński 2007). Even if salaries were not on the upswing in all professions requiring tertiary education (e.g. teachers in public elementary and secondary schools remained underpaid), the relationship between educational attainment and the success is ever more visible, with level of education being the crucial stratifier differentiating financial opportunities within the population. In 1982 the average difference between the earnings

3 However, it has to be noted that already at the twilight of the supposedly classless People's Republic of Poland, in 1988, the level of income inequalities in Poland as measured by Gini coefficient was at 0.28, equalling or exceeding inequalities in many capitalist states, for example in the Benelux countries, West Germany and Nordic states. Since then it has been growing steadily and since 2005 it has been at a level of 0.4 (Domański 2007, 312). This data comes from the Polish General Social Survey (part of International Social Survey Programme). Inequality as measured by official statistics was slightly lower, and since the peak (0.345) in 2005 decreased until 2009 (0.336) thanks to a variety of factors (e.g. due to mass post-accession migration and the large inflow of post-accession structural EU funds). In subsequent years it has grown up to 0.342, see: Szarfenberg 2012.

of those with a tertiary and those with a secondary education was at a level of 13.3%; in 2005 it was more than 61% (Domański 2007, 310).

So, it is not without the reason that the economic transformation at the beginning of nineteen-nineties was positively acclaimed by most of the academic spheres, with some prominent figures heralding the beginning of a new order. It is also understandable that the only public figure enjoying unanimous respect in Palska's study on the "winners of transformation" is Leszek Balcerowicz (Palska 2009, 256–257), the founding father of the neoliberal direction of the reforms. The debate about potential alternatives was weak and the very notion of capitalism was associated with its Anglo-Saxon model, without paying much if any attention to the other traditions of economic and social arrangements.

It is quite meaningful that the most powerful critical accounts of the outcomes of the transformations have been provided by foreign authors, i.e. David Ost, Elizabeth Dunn and Jane Hardy. Contrary to Polish scholars they do not refrain from taking a critical approach and using Marxist vocabulary to describe the processes of marginalization of the former allies of the elite – the working class (Ost 2005; Dunn 2004; Hardy 2009).[4] They have pointed out the social and economic hardships experienced by the "losers of the transformation".

As an anti-communist opposition, members of intelligentsia were once cooperating with workers creating the *Solidarność* movement and surviving the oppressions of martial law, which was introduced to defeat the largest social movement on the Eastern side of the iron curtain. The radically pro-market pathway of economic transformation was agreed upon jointly by the representatives of these two social groups when they constituted the first Polish post-war parliament elected in partially free

4 It is also quite evocative that all these authors were not avoiding the use of various applications of a Marxist approach to analysis of the social transformation. The reluctance of Polish scholars towards this way of conceptualizing social reality dates back to the period of the People's Republic of Poland. Erik Olin Wright recapitulates his experiences during his discussions with Polish sociologists who criticized his neo-Marxist approach: "What is the issue here is a dramatic difference in the contexts for pursuing radical intellectual work. In the Polish context of 1986, to declare that this was a reconstruction of Marxism meant something utterly different from what the same words mean when they are declared in the context of American sociology. In Poland, to reconstruct Marxism in the 1980s was to salvage an ideology of state repression. In the United States, to embed one's work in a rhetoric of reconstructing Marxism means, in contrast, to declare one's solidarity with struggles against capitalism, class inequality and oppression" (Wright 2005, 335). While the oppressive regime has vanished, Marxist accounts remain rare. Possibly the "solidarity with struggles against capitalism" is not considered as a virtue by Polish social researchers.

elections in June 1989 (Kowalik 2009; Kieżun 2013). Nevertheless, the costs of market reforms were not equally distributed in the society and the rapid impoverishment of certain sectors of society took place, together with a sky-rocketing unemployment level that quickly exceeded 20%, which mainly attributable to the rapid deindustrialization of some sectors of the Polish economy. Workers, who represented the largest share of members of Solidarity movement, quickly experienced the bitter taste of freedom.

Similar discursive processes to those used to justify the rapidly growing inequalities during the Reagan and Thatcher era became part of the Polish reality. The most interesting part of this process refers to the way in which the elites, including those in academic circles, addressed those who did not benefit from the process of transformation, who were not able to endanger the privileged position nor high status of the elites, but could easily change the political situation in the country via the ballot box, i.e. making use of their recently regained voting rights. Former allies in a struggle towards an oppressive regime, these groups suddenly became a burden on the society and a constraint on even quicker pro-market reforms. Adding insult to an injury, the new elite was very quick to stigmatize and blame the victims, i.e. those who paid the highest price for the transition to the market economy, pointing out their deficiencies and general backwardness.

This way of justifying the Polish transformation was similar to what happened in America. And it impacted the works of Polish scholars, who helped create the specific negative public image of those who did not make it to the top, or even to the middle of the social ladder (for an analysis referring to Polish press discourse on these social problems, see: Woźniak 2013, 2012; Pluciński 2010; Sowa 2010; Rek 2007; Rokicka and Warzywoda-Kruszyńska 2006, Chmielewska and Żukowski 2006, Szumlewicz 2006; Klebaniuk 2004; Podemski 2013).

Thus, the 'debate' on the aims and objectives of social policy, which should address the issue of selection of particular modes or types of welfare regimes, has been completely absent, or at least present only in among a narrow academic circle of scholars specializing in social policy. In the general public debate over the idea of retrenchment from a generous and allegedly paternalistic socialist welfare state has been halted, a fact which is presented as part of the wider process of retrenchment from bankrupting welfare states, and a phenomenon which is occurring also in Western Europe. This happened despite the fact that during the Round Table Talks which ignited the process of peaceful transformation, the socially responsible way of transforming the economy in accordance with the principles

of a social market economy was agreed upon. Tadeusz Kowalik, advisor of the Solidarity movement, recalls a report prepared in the beginning of the year 1989 by the prominent Polish economists which positively assessed the possibility of implementing the Scandinavian model of economic and welfare arrangements in Poland (2009, 110–113). However, the decision-making was very quickly delegated almost exclusively to Leszek Balcerowicz and his closest allies, Jeffrey Sachs and David Lipton. The debate was over and the pathway of transformation was chosen.

Homo Sovieticus. Underclass à la Polonaise

If "underclass" was the term used to help create the image of a certain social group among the American public, *Homo Sovieticus* played a similar role in Polish circumstances. The following subchapters attempt to point out the most specific features of the discursive use, and misuse, of this term. It had been coined by Alexander Zinovyev, but in Poland it was popularized by Józef Tischner. He used the term *Homo Sovieticus* in his articles describing his regret and disappointment with the results of the first free presidential election (see: Zinovyev 1986; Bonowicz 2003, 422-427; Tischner 1992). During the first-round balloting, Stan Tymiński, a re-émigré and complete newcomer in Polish politics and unknown businessman from Canada making bold promises, managed to defeat Tadeusz Mazowiecki, one of the most respected intellectuals; a member of anti-communist opposition and the first non-communist Prime Minister.

Homo Sovieticus became very popular term during the forthcoming years, both in academic articles as well as in public debate. The usage made of this notion and its most coherent conceptualization and contextualization has been provided by Piotr Sztompka, one of the most influential Polish scholars and an internationally recognized sociologist. In Sztompka's work, the crucial term describing specific features of the *Homo Sovieticus* mindset is "civilizational incompetence." This term covers a wide range of mental characteristics which did not allow him/her (i.e. the *Homo Sovieticus*) to fully legitimize the state of affairs in Polish society which resulted in their political choices. Among the most prominent of these characteristics Sztompka lists the support of egalitarianism and 'disinterested envy' of the more affluent or successful, an acceptance of state paternalism, anti-elitism, and anti-intellectualism; an example of the latter is the opportunistic adoption of double standards, camouflage in mediocrity, and the common or even institutionalized practice of evading rules imposed by the regime, with insubordination treated as a virtue (Sztompka 2001, 22).

Aronoff and Kubik, recent critics of the concept of *Homo sovieticus*, underline that for Sztompka, people affected with this defect constitute a burden on society, being a constraint on modernization and transition to a real market democracy. Thus it follows that getting rid of this cultural syndrome is a central task for the elites in a post-communist society – "a prerequisite, a necessary condition for attaining true modernity: authentic democracy, a functioning market and open society" (Sztompka 1993, 91; Aronoff and Kubik 2013, 254).

Sztompka claims, without presenting any empirical evidence whatsoever, that the aforementioned egalitarianism was: "directly shaped by communist propaganda and indoctrination" (Sztompka 2008, 137). He underlines, that Polish people:

> were not equally affected by the syndrome of *Homo Sovieticus*. There were intellectual, academic, artistic or opposition elites – cosmopolitan and Western-oriented – who were able to insulate themselves against the syndrome and already under communism embraced, in their imaginations, dreams and aspirations, the standards and values of the 'free world'. Such elites became the carriers of the new mentality, spreading it to their followers and emulators (Sztompka 2008, 45).

Sztompka acknowledges that there were structural factors unequally distributed among social groups, which influenced their coping strategies. He states that "those who were fighting against the communist regime and safeguarded the victory of the revolution – and this means primarily the working class of huge industrial enterprises – feel cheated, as their lives have generally not improved, and for some have even become dramatically worse" (Sztompka 2008, 46).

However, he again postulates that their problems are located inside their mentality and caused by excessive expectations: "People experience relative deprivation when they believe that they are justified in deserving more than they actually have" (Sztompka 2008, 46).

In most of his depictions of the transition period Sztompka is reluctant to employ any kind of empiricism, concentrating instead on his narrative. However, his description of the mythology of the "Polish Dream" that created the opportunities for all, or almost all, who were active enough and deserved their chance, is based on some empirical observations: "we have observed a true outburst of entrepreneurial activities, with millions (yes, millions) of small new firms started and some of them soon developing into serious enterprises" (Sztompka 2008, 48). Yet, these observations were not nuanced with the commonly accessible knowledge that the mass increase in number of enterprises was and still is strictly

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related to the process of rapid deindustrialization which commenced in Poland in the beginning of the nineteen-nineties, and which lead to mass unemployment. The actual collapse of the industrial sector lasted for a significantly shorter period of time than the deindustrialization which took place in the Western Europe in earlier decades. According to the estimations by Henryk Domański, between the years 1991 and 1993 half of the newly established businesses were started up by former workers, among which 44% by unskilled labourers who were simply striving to avoid the unemployment trap and pauperization.[5] For some reason, the intelligentsia was not instilled with the entrepreneurial spirit, as only 7% of the new entrepreneurs came from this group (Domański 2007, 295–299). Soon they become even more privileged and distanced in economic terms from the rest of the population, and also became even more vocal in praising meritocracy. Another distinguished Polish professor of sociology and Rector of one of the most prestigious Polish private universities states, in his textbook *Sociology of public life*, that: "Social inequalities are justifiable, if an essential condition is fulfilled, namely 'outcomes' are proportional to 'inputs'". The author continues by drawing a distinction between authoritarian and totalitarian states, where merits are valued arbitrarily, and market economies where the valuation is decided fairly, that is by the market itself (Wnuk-Lipiński 2005, 63). As Michael Walzer put it: "Meritocracy, or the career open to talents, is the principle of those who claim to be talented: they are most often the monopolists of education" (Walzer 1983, 12).

This kind of pro-market eudaemonia comes back in references to the "wise shock therapy" of Leszek Balcerowicz, as it was described by one of Palska's informants (Palska 2009, 53). The "Balcerowicz plan" and its social consequences are nowadays criticized for neoliberal orthodoxy, leaving aside the issues of the increase in poverty and significant growth of social inequalities. This critical assessment is provided not only by political activists and critics of neoliberalism like Naomi Klein (2007), or distinguished Polish economists (Kowalik 2009; Kołodko 2011, 2009),

5 Another "outburst of entrepreneurial activities" was noted between 2002 and 2004, when the number of enterprises doubled. However this was not caused by the spirit of capitalism suddenly descending upon the Polish population, but due to the liberalization of the labour code, which permitted employers to outsource employees from permanent contracts to the sector of self-employment, allowing companies to cut down expenditures for social and health insurance. The change of the status from employee to those self-employed who registered as the owners of newly established companies was strictly formal in nature and applied to a large number of workers from diverse occupational categories.

but also by those who were once the closest political and ideological allies of Balcerowicz, like Jeffrey Sachs, who dares to admit that the shock therapy had its unexpected and dramatic consequences for a significant share of the society (Żakowski 2009).

An interesting critique of the way in which Sztompka and others presented their argumentation was provided by the anthropologist Michał Buchowski. Drawing on Edward Said's conceptual framework of "the Orient", "the Occident" and "the Other", Buchowski shows how the discursive strategies used by intellectuals supporting the neoliberal transformation of society created a social image of "the Others" – in this case the poor people, those suffering from the changes, burdened the civilized part of the society with the legacy of their soviet mentality. He points at phenomena which strengthen the symbolic and moral dominance of the "civilizationally competent winners of transformation." He pays special attention to the usage of such semantic strategies by intellectuals with high academic and public position. Buchowski also quotes some very definite public statements by Jan Winiecki, a distinguished professor of economics:

> The only group whose situation has worsened in absolute terms (and not in relation to other groups) is constituted by employees of former state-owned farms. They are doing bad, because they never learned how to work and after the liquidation of these inefficient establishments, they are not able to steal any more (quoted in: Buchowski 2006, 467).

This opinion refers to the situation of more than four hundred thousand low-qualified agricultural workers who lost their jobs overnight at the turn of the years 1992 and 1993 due to the political decision which treated all state farms the same way, regardless of their economic standing and/or prospects for the future. Altogether this decision affected approximately two million people, counting their families. Since that time they have lived on the fringes of society, in most deprived rural areas of Poland, with unemployment levels exceeding 30%, and without any kind of the structural support which has been offered in at least some sectors of industry. The only benefit they were provided with was the possibility to buy out the flats or houses formerly belonging to the farms. This act of charity wound up creating even worse conditions for the unemployed by limiting their spatial mobility. They were unwilling and/or unable to sell the only possession they had and take the risk of starting life again somewhere else, and thus became "chained" to their local, and ever more deprived and deteriorating, communities. The conventional

wisdom, after almost two decades still frequently repeated in the media and whatever public debate exists, refers to the collapse of the former state farms as a result of their economic ineffectiveness, overlooking the real story behind the process (Kowalik 2009).

Buchowski also elaborates on Sztompka's concept of "civilizational competence", illustrating the derogatory terms which are used to describe the victims of transformation, not only agricultural but also industrial workers as well. They are not only incompetent and lacking in social skills. They are also a burden on society because of their moral weakness. They represent a specific combination of characteristics. Their unproductive passivity is linked with an insolent and demanding attitude. Their voluntarily acquired helplessness is accompanied by an immoral resourcefulness by which they use loopholes in the social assistance schemes to take advantage of the state. As Buchowski summarizes: "they are not people with problems but themselves are the problem" (2006, 468). The suffering and deprivation of a significant share of Polish society were not caused by any structural factors, but supposedly by the specific state of their minds and souls.

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This kind of diagnosis, formulated by distinguished scholars in academic works and replicated thousands of times in the media, infiltrates the attitudes of the public, which becomes saturated with certain clichés, useful and easy to handle, offering not only justifications for state of the affairs in the society, but also providing self-confidence and satisfaction with belonging to the 'better off' part of society. Not only the mass-media, but also academic textbook, among them the most popular Polish sociology textbook (Sztompka 2003), contain these kinds of accounts, often hidden behind the façade of objective and axiologically neutral, scientific reflections. This also provides good grounds for and consensus among those in power, legitimizing the welfare retrenchment and further liberalization of economy in the name of minimizing state's expenditure on the undeserving strata of society. The position of those at the top is well-deserved, as they are fulfilling most of the meritocratic criteria, which are not being met by the undeserving *Homines Sovietici*.

The fundamental critique of these clichés comes from Zsuzsa Ferge. She points out value-laden and highly normative premises of the *Homo Sovieticus* used as a key-term to describe the insufficient moral and civilizational competence of certain spheres (the poor) of East-European societies. The authoress notes that the supposed primitive egalitarianism and demanding attitude towards the state, or learned helplessness of those relying on state welfare, are classical labels used by the critics of the welfare state everywhere. Even leaving aside the argument that

these are commonly accepted and treated as ideologically-indifferent universal truths in Eastern Europe, and not the voices in pluralist and public debates, it must be noted that the basis for such assumptions has very weak empirical roots. Blanket statements about the lack of self-reliance caused by communism ignore the historical evidence that socio-psychological characteristics of large social groups result from their historical heritage and are not limited just to several decades of Soviet dominance. Contrary to Sztompka, who refrains from using any empirical evidence, Ferge elaborates on a rich amount of data to claim that, from the point of view of the modern welfare state analysis, "the socialist paternalist state is a legend and even after several decades of state socialism, the 'communist' social protection system never approached Western standards" (Ferge 2008, 144). During the "golden age of the welfare state" which lasted for several post-war decades, the level and quality of social protection available to the labour force in Western states was incomparably better to that available in the East, regardless of the official policy of full employment, the official declarations on the eradication of poverty, or the officially announced high esteem for the working class. The economy of permanent shortage was not covering the needs of families and individuals in any way that could be compared to the standard of living accessible to workers in Western countries. This very fact, which is acknowledged by many economists as central to their criticism of the inefficiency of centrally-planned economies, is purposely omitted when blaming the generous and paternalistic socialist welfare state for making people helpless, passive and demanding. Thus, the main arguments regarding reasons for the development of the allegedly specific East-European mentality under the socialism does not comply with the well--known features of the everyday life during this period. Ferge observes:

> Learned helplessness seems to be a convenient myth and prolonged infantilism a malevolent one. People had to have many skills to organize everyday life under conditions of a shortage economy, and to do it on a shoestring. Moreover, people had to cope with countless problems on their own because the welfare system was defective and rigid. (…) They had to cope on their own without public help, social work, market solutions, or supportive civil organizations (Ferge 2008, 145).

As Ferge proves on the basis of numerous comparative pan-European surveys, egalitarian attitudes and assumptions about the role of the state presented by Eastern Europeans do not vary substantially from those presented by their Western counterparts, who grew up and lived

the healthy and 'civilizationally favourable' circumstances of capitalism.

Plenty of statements legitimizing the constraints on economic growth posed by those at the bottom of the social ladder can be found in a book containing a dialogue between distinguished scholars, Piotr Sztompka and Andrzej K. Koźmiński, professor of management and founder and owner of the best private university in Poland. The book is titled: *Dialogue about the great transition*. Koźmiński identifies the most important shortcomings of the mentality of Poles in the following way:

> We would like to have a state which takes care of us, but also which could be tricked by us. Half of the disability pensions are wangled for bribes. Only nobody knows which half that is. The same is true of sick-leaves; probably half of them are wangled. Today people do not take sick-leaves so easily, because they are afraid of getting sacked. But cheating is still commonly accepted. (...) Is it true that only the rigorous conditions of the free market and strict controls can change this state of mind? It is no surprise that people are against them. The most grotesque are the protests and blockades of taxi drivers against the law forcing them to install cash registers in their cars. They are simply defending their right to commit swindles (Koźmiński and Sztompka 2003, 44).

The failures of the Polish economy are explained here through the mental characteristics of individuals. Their defects justify the need for strong control over the labour force. No empirical evidence has ever been provided for the accusations against the benefit recipients. Still this kind of argumentation is very common in public discourse in Poland, neglecting the fact that the growth in the number of disability pensions and early retirement pensions resulted from a conscious policy of the state at the beginning of the transition aimed, at slowing down the further growth of the anyway sky-rocketing unemployment. Tadeusz Kowalik used the term "neoliberal welfare state" to label this way of "counteracting" the rise in unemployment (2010).

The issue of "grotesque" taxi drivers' protests is also presented without contextualization. They were protesting also against unequal treatment by the newly introduced legislation. They were made to install cash registers to prevent them from 'swindles' related to avoidance of paying Value Added Tax. According to the same regulation, services provided by members of newly-established middle class were exempted from this kind of regulation after their successful (and not "grotesque") lobbying in parliament. Private legal chambers or medical clinics do not have to fulfil that kind of obligation, which was considered by the protesters as being against the rule of equality before the law. On the other hand,

the way it has been presented is in accordance with the presumption that civilizationally competent and well-educated individuals are immune to the *Homo Sovieticus* syndrome that makes 'others' act immorally. George Homans labelled the functional theory of stratification as an attempt to refute Marx by proving that the proletariat had no intellectual or moral right to demand its money or life (Romero and Margolis 2005, 1). Some Polish scholars add their efforts to this task. This also brings to mind the statement of the Montagu Collet Norman, the director of the Bank of England during the inter-war period, cited also by Buchowski in the above-mentioned article. Referring to Polish competence in economic affairs, Norman stated that "it is the misfortune of Poland that she is populated by the Poles" (quoted in: Buchowski 2006, 479). It seems that at least part of the circle of Polish intellectuals share that sentiment. However, the 'misfortune' refers here only to a certain strata of the society, which in consequence experiences a secondary victimization.

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The poor under attack – notes from the fieldwork

The reflection and/or result of this kind of discourse was observed by sociologists from the University of Łódź, who during the years 2004–2007 carried out the international comparative project called Policy Responses Overcoming Factors in the Intergenerational Transmission of Inequalities (PROFIT) – for published results referring to this article's theme see: Warzywoda-Kruszyńska et al. 2006, 2007; Woźniak 2007a, 2007b, 2007c, 2010).[6] The main research topic was the issue of intergenerational transmission of inequalities and the potential policy impact of this process. Various groups of professionals who could contribute to the policy-making and/or policy implementation were approached by the researchers. Interviews were conducted with members of the parliament working in the Committee for Social Affairs, representatives of local public administration, local councillors, managers from welfare services institutions, voluntary workers from NGOs, as well as the so-called 'frontliners' – social workers, probation officers, employment counsellors, and teachers – those who in their every day job deal with people affected by poverty, unemployment and various resulting social deficits.

6 PROFIT (*Policy Responses Overcoming Factors In the Intergenerational Inheritance of Inequalities, CIT2-CT-2004-506245*) was an international research project financed under the 6th Framework Programme of the European Commission, realized in eight European countries and coordinated by the University of Lodz. More information at: http://www.profit.uni.lodz.pl/.

It can be assumed that politicians, although representing different political orientations, are immersed in the discourse which is dominant in a given country and legitimized by specific values and norms (especially those who operate only on the national level, i.e. are not involved in the debates in the European parliament or are without experience in supranational bodies). The semantic strategies mentioned above and the phraseology which addresses poor people and their problems are reflected numerous times in the transcripts of interviews. The specific language code used when talking about welfare recipients is undoubtedly, at least to some extent, an outcome of the way these issues are addressed in the public debate. The most common semantic constructs found in the statements of the respondents referring to the poor were: passivity, lack of productivity, lack of skills indispensable to accommodate the new social conditions, demanding attitude, learned helplessness, welfare dependency, pathology and demoralization, anti-social behaviour, immoral resourcefulness. Many respondents perceived the reasons behind the economic situation of the welfare recipients as resulting from individual, psychological and moral characteristics, and not in structural terms. This also refers to the employees of social services who themselves, due to their low wages, belong to the group of working poor. The modernization and progress of the country is therefore seriously hampered by those at the bottom who cannot adjust to the new conditions and follow the new rules.

When referring to the state's responsibility for the dependents' fate, structural conditions were rarely addressed and the "blame the victim" strategy and secondary victimization of the poor was visible and arguments from the public debate were easily recognizable.

The children affected by poverty, since they could not be blamed for their fate, constituted the only group of deserving poor, apart from disabled people. At the same time they were perceived as endangered by infection with the social diseases spread by their parents. In accordance with the frequently misinterpreted concept of "culture of poverty", they are supposed to replicate all the negative characteristics of their families of origin.

In some cases even the determinist reasoning, referring to an inborn and unavoidable transmission of some *Homo Sovieticus* gene was mentioned in this context. The economic and cultural processes taking place in Poland over the past two-plus decades were usually presented as the drivers enhancing motivation, activity and entrepreneurship of the "healthy" part of the society, creating opportunities and conditions for a prosperous life for all. Accordingly to this way of thinking, it was individual characteristics and defects that did not allow the poor

in society to realize the "Polish Dream", and not related to structural circumstances. This kind of attitude towards the members of the lower strata is connected with the stigmatization processes occurring in the media and – at least to some extent – justified and legitimized by social scientists. None of the respondents from neither the central or neither local levels of government ever mentioned the civic rights which are supposed to be guaranteed to all citizens by the constitution. All expenditures for the purposes of supporting the poor were treated rather as a form of charity.

Any hope of realizing a coherent and cohesive policy has also been hampered by strictly political reasons. Respondents from all spectrums of the political scene acknowledged that children, young people and large families are among the groups mostly endangered by the poverty and inequality. However, as openly stated by one of the MPs participating in the research:

> And certainly children and youth are groups which are pushed out from the public discourse. When we speak about political criteria, the fact that half of the population below the age of 19 lives below the poverty line cannot get into the politicians' consciousness. They are not aware that this group, according to all studies and researches, are mostly endangered by poverty and that special actions aimed on equalizing their life opportunities should be introduced. (…) All these factors are absent in political decisions and I assume that this is so for reasons. Children and the youth simply do not vote.[7]

Not only children do not vote, but also their parents living in deprived areas of Poland rarely make it to the ballot-box, contributing to the lowest voter turnout in European Union. On the other hand, the most disciplined group of voters is formed by the elder generation, mainly pensioners. Hence, most of actions in the field of social policy, as well as the messages during electoral campaigns, are aimed at this age group, even though the data from EU-SILC shows that in 2006, the chances of falling below the poverty line were more than three times lower for people aged 65 and over (8%) compared to the age group 0-17 years (26%). According to data from Eurostat in 2006, 7% of the retired population was at risk of poverty, compared to 45% of the unemployed and 18% of those in employment (European Commission 2009, 2010).

It needs to be underlined that all major political parties white at the office were unanimous in supporting the way of thinking about transformation of economy and social policy as sketched above. The differences were

7 All quotations come from the transcripts of interviews conducted by the author during the course of PROFIT project.

visible in declarations, particularly in electoral campaigns. During the realization of the PROFIT project researchers faced opinions varying from the strictly neoliberal declarations supported by the Civic Platform the party which is ruling in Poland since 2007. MP from this party shared the views that: "the state should just not disturb. The state should stand back, especially from the economic field. Only liberalization of economy and the labour code can lead to the economic growth, which is the only panacea for unemployment and poverty."

Elaborating on the features of socialist times inherited by Polish economy and minds:

> I believe that the next generations, starting from the sense of competition at schools – for example external examinations serve this purpose and lots of other things – they will somehow understand that enterprises are nor for them to work there, instead they are to produce something and they and people must adjust to this. Such is the psychological difference between the market economy and this real socialism. And the whole generation which is still coming out of real socialism are not able to understand this.

The neoliberal pathway of transition was followed by the Democratic Left Alliance which while in office (2001–2005) continued implementation of pro-market economy and fiscal policy during their term, contributing to the aforementioned liberalization of the labour code and introducing the flat rate taxation for companies (reducing the rate from 28 to 19 percent).

The most coherent visions in favour of the social justice were formulated by the members of Law and Justice, party ruled by Lech and Jarosław Kaczyński, twin brothers. One of the other leaders of this party while asked in an interview about inequality reproduction and state's responsibility answered:

> Inequality inheritance is like a vicious circle. It is a chain of impossibilities. To break free from it one must do it alone or with the help of somebody else. This may be the state, some external organization. There is a kind of outstanding individuals who are lucky, but it is a cultural phenomenon of some sort, a social phenomenon, that the state must notice the problem, intervene, direct some (…), it must take pliers and cut that chain, it must help these people out.

He stated also that the dominance of neoliberal ideas supported also by the post-communist was to blame for the state of affairs:

> unfortunately the position of the labour unions is very weak in Poland, they aren't a strong partner among these three. Enterprisers are perfectly organized, they have confederations, they have money, they have opinions, they have

> something to show, logistic infrastructure, and unions are fading, which is dramatic. (…) And the social policy goes through all sort of twists and turns and though we have a leftist government, the policy is ultra or definitely liberal, antisocial, anti-human, a real comedy.

The post-communist vs. post-Solidarity axis of political conflict was replaced in the year 2005 by the argument between "Solidarity Poland" represented by Law and Justice declaring themselves as the protectors of ordinary people and victims of transformation against "the liberal Poland" of Civic Platform whose leaders envisaged the need for further pro-market reforms. Law and Justice came to the rule winning the election in the late 2005. Their triumph was doubled with the win of Lech Kaczyński in a presidential race. Kaczyński himself member of the Solidarity movement imprisoned by the communists during the Martial Law in 1981 and professor of the labour law, defined himself as a conservative politician with socialist views on the economy. Nevertheless, after winning the election the party nominated for the position of Prime Minister Kazimierz Marcinkiewicz who during his first interview in the office when inquired about the social model that inspires his most declared: "I was most impressed by London. And what was achieved in Great Britain thanks to Margaret Thatcher" (Żakowski 2005). When asked about the intellectuals whom are most respected by him, he mentioned two names: Francis Fukuyama and Milton Friedman. After this kind of declaration it was not surprising that among the crucial decisions of Law and Justice government in a field of economy were: abolishment of inheritance tax regardless of the assets of the deceased, decreasing of personal income taxation in favour of those at the top (two rates: 18% and 32% instead of three: 19%, 30% and 40%) and reduction of the social insurance contributions both for the employer and employees.

Summary

The 'winners of transformation', those who succeeded thanks to their educational attainment and professional status, have become very active in defending the meritocratic way of stratifying society. Meritocracy is another example of a word which has changed its meaning overtime. Bitter reflections on this can be found in the last works of Michael Young, who coined the term half a century ago in his dystopian novel "Rise of Meritocracy" (1953). Maybe unanimous support for the chosen path of transition and acceptance for the growing inequalities could be to

some extent explained via statements of Young:

> In the new social environment, the rich and the powerful have been doing mighty well for themselves. They have been freed from the old kinds of criticism from people who had to be listened to. (…) If meritocrats believe, as more and more of them are encouraged to, that their advancement comes from their own merits, they can feel they deserve whatever they can get. They can be insufferably smug, much more so than the people who knew they had achieved advancement not on their own merit but because they were, as somebody's son or daughter, the beneficiaries of nepotism. The newcomers can actually believe they have morality on their side (Young 2001).

It seems that the topic of the social responsibility of the elites has vanished from the public sphere in Poland, at least partially because the new elites, policy-makers, media and intellectuals who set up the agenda have defined the topic as meaningless. Among the reasons of the state of affairs which has been described above, one can note the substantive weaknesses of public media, which is involved in political conflict and it treated as another political institution dominated by the ruling party. The private media, on the other hand, mainly belongs to foreign corporations which follow a strictly pro-market way of thinking, promoting and supporting solutions beneficial for business lobbies. The role of intellectual and academic circles in sustaining consensus over what is and what is not an important topic on the agenda should not be overlooked either. It seems that the public debate in Poland has to a large extent mimicked what happened in the United States during the triumphant years of neo-conservatism. This can also be observed in other fields of the public debate which are outside the framework of this paper, such as penal policy, foreign policy regarding the war on terror, prioritizing spending on the military sector, and others.

A couple of years ago one of the Polish sociologists involved in studying the social consequences of transition and presenting the results of research on diaries documenting the dramatic situation and life strategies of poor and unemployed was accused of performing "lamentable sociology" by another distinguished professor of sociology (Rek 2007, 366). Michael Burawoy, in one of his addresses urging the public involvement of sociologists issued an appeal: "Sociologists must come out of the shells, the shells into which they retreated when the market euphoria was raging around them" (Burawoy 2009, 198). It seems that for Polish social scientists the choice was threefold: whether to lament, to retreat, or to enthusiastically praise the new order.

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Tytuł: *Od underclass do Homo sovieticusa: Czynnik ludzki hamulcem modernizacji*

Abstrakt: Celem artykułu jest zaprezentowanie pewnych procesów dyskursywnych uzasadnających wybraną ścieżkę społeczno-ekonomicznej transformacji ku kapitalizmowi w Polsce. Szczególną uwagę poświęca się roli elit w kształtowaniu dyskursu publicznego legitymizującego znaczącą pauperyzację społeczeństwa oraz wzrost nierówności społecznych jako wynikający z indywidualnych deficytów oraz „cywilizacyjnej niekompetencji" jednostek znajdujących się na dole struktury społecznej. Tych polskich obywateli prezentowano jako hamulec i przeszkodę w osiągnięciu szybszego tempa procesów modernizacyjnych. Wpłynęło to zarówno na sposób myślenia polityków zaangażowanych w podejmowanie decyzji na szczeblu ogólnopolskim, jak i na postawy tych, wdrażających działania społeczne na poziomie lokalnym. Ponadto przyczyniło się

do niepisanego konsensusu wśród partii politycznych głównego nurtu odnośnie neoliberalnych reform w gospodarce i polityce społecznej.

Słowa kluczowe:
Homo sovieticus, elity, Polska, postkomunizm, dyskurs, transformacja społeczno-gospodarcza, modernizacja

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constant transition