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Ajda HEDŽET*

REŽIMSKA KOMPLEKSNOŠT IN MEDNARODNO (NE)SODELOVANJE: ANALIZA PRAVIC BEGUNCEV NA PRESEKU MEDNARODNIH REŽIMOV**1

Povzetek. Članek analizira, pod katerimi pogoji režimska prekrivanja spodbudijo ali omejijo cilje mednarodnega sodelovanja ter kako režimska kompleksnost vpliva na strategije, v okviru katerih akterji naslavljajo problematiko upravljanja migracij za zagotavljanje dostopa do pravic posameznikom, ki so morali zapustiti svojo državo. Članek na podlagi analize elementov režimske kompleksnosti oblikuje analitični okvir za preučevanje vpliva režimske kompleksnosti na sodelovanje na preseku režimov mednarodnega varstva človekovih pravic in varstva beguncev. Analiza v članku razkrije, da se zaradi režimske kompleksnosti na proučevanem preseku odpirajo priložnosti za sodelovanje, ki jih akterji izkoriščajo, da se izognejo manj ustreznim mednarodnopravnim načelom, institucijam in mehanizmom.

Ključni pojmi: režimska kompleksnost, mednarodno sodelovanje, pravice beguncev, mednarodni režim varstva človekovih pravic.

UVOD

Mednarodna skupnost je poznana po svoji anarhičnosti, tj. po odsotnosti osrednje izvršilne oblasti (Zürn 2010). Kljub temu pa so države za reševanje in upravljanje čezmejnih problemov že po koncu prve svetovne vojne začele oblikovati številne mednarodne organizacije (Panke in Stapel 2023). Ustanavljanje mednarodnih vladnih organizacij (MVO) z raznolikimi pristojnostmi in področji delovanja je spodbudilo nadaljnji razvoj mednarodnih režimov. Te so raziskovalci v znanosti o Mednarodnih odnosih (MO) široko opredelili kot sklope »implicitnih ali eksplicitnih načel, norm, pravil in postopkov odločanja, okoli

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¹ Članek je nastal kot del raziskovanja v okviru raziskovalnega programa P5-0177 Slovenija in njeni akterji v mednarodnih odnosih in evropskih integracijah.

katerih se na določenem problemskem področju zблиžujejo pričakovanja akterjev« (Krasner 1983, 2). Od 80. let 20. stoletja so mednarodni režimi v okviru razprav o institucionalizaciji mednarodnega upravljanja čezmejnih problemov osrednje raziskovalno področje v MO (Levy, Young in Zürn 1995; Roter 1999).

Močna usmerjenost držav k podeljevanju širokih pristojnosti MVO, podpisovanju sporazumov in oblikovanju norm in pravil, ki vplivajo na odločitve o mednarodnem sodelovanju, je spodbudila nastanek zapletenih mrež akterjev, pogodb in režimov ter posledično vodila v oblikovanje t. i. režimskih kompleksov (Raustiala in Victor 2004; Alter in Meunier 2006). Mednarodno režimsko kompleksnost raziskovalci opredeljujejo kot »lastnost, ki se nanaša na zapletene ali ugnezdene, delno prekrivajoče se in vzporedne mednarodne režime, ki niso hierarhično urejeni« (Alter in Meunier 2006, 365).² V sodobnem mednarodnem sistemu režimska kompleksnost državam omogoča izbiro med različnimi »forumi, ponudniki storitev in sekretariati institucij« (Betts 2013, 69).³ Učinkovanje kompleksnosti na upravljanje posameznega področja je odvisno od vzajemnega delovanja systemskega prelivanja med prekrivajočimi se mednarodnimi institucijami ter vrst strategij, ki jih akterji pri tem zasledujejo (Gomez-Mera 2015, 2).

Raziskovalci opozarjajo, da lahko režimska kompleksnost na eni strani spodbuja oblikovanje strategij držav, ki temeljijo na večrežimskem delovanju, in s tem povečujejo učinke sodelovanja, na drugi strani pa odpira tudi možnosti za uporabo strategij izbiranja forumov, ki imajo lahko škodljive učinke (Alter in Meunier 2006; Gómez-Mera 2015; Kreuder-Sonnen, Schmotz in Zürn 2025). Kadar veliko institucij deluje na istem problemskem področju in si delijo pristojnosti upravljanja, režimska kompleksnost omogoča premike v ciljni instituciji ter selitve akterjev med vzporednimi institucijami. Ti premiki so temelj raziskovanja večinstitucionalnih političnih strategij, s katerimi akterji zasledujejo svoje cilje in vplivajo na oblikovanje politik v mednarodnih odnosih.

V članku se osredinimo na analizo kompleksnosti na preseku dveh osrednjih mednarodnih režimov: režima varstva beguncev in režima mednarodnega varstva človekovih pravic (MVČP). V luči vojne v Sudanu, Siriji in Ukrajini, genocida v Palestini, humanitarne in politične krize v Venezueli, razpada Iraka ter nestabilnosti na Afriškem rogu in na območju afriških velikih jezer je mogoče trditi, da so sodobni migracijski tokovi preoblikovali središča odločanja, zmanjšali zmogljivosti držav za nadzor migracij ter predrugačili razmerja med državami, MVO in regionalnimi akterji (Pannzion in van Riemsdijk 2018, 1225).

² Odsotnost hierarhičnega reda med režimi na mednarodni ravni predstavlja ključno razliko v primerjavi z ureditvijo pravnih načel na nacionalni ravni, saj otežuje določanje pristojnosti odločanja (Alter in Meunier 2009).

³ Raziskovalci režimske kompleksnosti so pozornost usmerili v raziskovanje delovanja držav, MVO in oblikovane funkcionalne preseke med institucijami, ki delujejo na sorodnih področjih (Young 1996; Alter in Meunier 2006; Drezner 2009; Johnson in Urpelainen 2012; Betts 2013; Lavenex 2015). To so storili z vidika institucionalnih prekrivanj, ki akterjem omogočajo izbiranje forumov, in premikanja med režimi (Abbott in Snidal 1998; Busch 2007; Betts 2009; Helfer 2009).

Presenetljivo je, da ostajajo v MO slabo raziskane ravno zapletene institucionalne strukture, ki zaznamujejo upravljanje mednarodnih migracij (Alter in Meunier 2009; Jules 2018; Lavenex in Piper 2021). Posledice režimske kompleksnosti na tem področju namreč še niso bile celostno obravnavane, čeprav je za migracije značilna izrazita raznolikost tokov, sestavljenih iz pribežnikov, migrantov, beguncev in notranje razseljenih oseb, ki so pogosto tarča restriktivnih politik. Te z različnimi ukrepi omejujejo dostop do mednarodne zaščite tistim, ki jo najbolj potrebujejo (Feller 2006; Lavenex 2024).

Članek dopolnjuje razumevanje mednarodne režimske kompleksnosti in povezanih strategij v MO. Proučuje, kako v primeru prekrivanja režima MVČP in režima mednarodnega varstva beguncev element kompleksnosti vpliva na zmožnost mednarodnih akterjev, da učinkovito upravljajo globalne probleme. Članek analizira razmere, v katerih režimska prekrivanja spodbujajo ali omejujejo cilje mednarodnega sodelovanja, ter razkriva, kako režimska kompleksnost vpliva na strategije, s katerimi akterji rešujejo problematiko upravljanja migracij in zagotavljanja dostopa do pravic posameznikom, ki so bili prisiljeni zapustiti svojo državo.

Analično članek gradi na konceptu režimske kompleksnosti, ko raziskuje vpliv oblikovanja institucij in njihovih interakcij na globalno upravljanje migracij (Biermann, Pattberg in Van Asselt 2009, 15). Na podlagi analize interakcij te umešča v tri kategorije kompleksnosti: 1. režimsko ugnedenost, pri kateri je institucija del multilateralnega okvira upravljanja (Aggarwal 2000); 2. paralelnost, pri kateri institucije delujejo na sorodnem, a ločenem področju, njihovo delovanje pa je osredotočeno na specifično regijo ali problematiko (Blavoukos in Bourantonis 2017, 305), 3. presečnost, pri kateri se več MVO ukvarja z eno problematiko (Raustiala in Victor 2004; Alter in Meunier 2006; Betts 2010).

Poleg uvoda in zaključka ima članek še dva vsebinska dela. Cilj prvega dela je na osnovi analize režimske kompleksnosti razviti analitični pristop, ki omogoča operacionalizacijo koncepta režimskega kompleksa na primeru prekrivanja mednarodnih režimov varstva beguncev in MVČP. Prvi del se zato osredini na analizo učinkov režimske kompleksnosti na upravljanje področja in delovanje akterjev. Drugi del pa preučuje prepletenost na preseku režima varstva beguncev in MVČP ter analizira priložnosti za delovanje, ki jih režimska kompleksnost na tem preseku odpira akterjem. Cilj drugega dela je tako identificirati razmere, v katerih režimsko prekrivanje spodbuja ali omejuje cilje sodelovanja med proučevanima režimoma.

REŽIMSKA KOMPLEKSNOŠT NA PRESEKU MEDNARODNIH REŽIMOV IN NJENI UČINKI NA UPRAVLJANJE V MEDNARODNIH ODNOSIH

Raziskovalci mednarodnih odnosov že od začetka 21. stoletja intenzivno preučujejo dinamiko kompleksnosti v prekrivajočih se mednarodnih režimih (Haas 2019, 7). Ta premik v raziskovalnem fokusu se odraža že v zgodnji konceptualizaciji pojma režimski kompleks, ki sta ga Raustiala in Victor (2004, 278–79) opredelila kot »skupek delno prekrivajočih se in nehierarhičnih institucij,

ki upravljajo določeno področje«. Ta opredelitev zajema temeljne mednarodne režime, katerih medsebojno prekrivanje vodi v oblikovanje kompleksne institucionalne konfiguracije: režimskega kompleksa.

Izhodiščno opredelitev sta Alter in Meunier (2009, 9) nadgradili z opozorilom, da režimski kompleksi ustvarjajo »zapletenost pravil«, pri čemer je odsotnost hierarhije njihova ključna značilnost. Za nadaljnji konceptualni razvoj je ključen prispevek Orsini, Morin in Young (2013, 29), ki režimski kompleks opredelijo kot »mrežo treh ali več mednarodnih režimov, povezanih s skupno tematiko, z delno prekrivajočim se članstvom in z gmotnimi, normativnimi ter operativnimi interakcijami, ki lahko postanejo problematične, kadar niso ustrezno upravljane«.

Čeprav se je koncept režimskega kompleksa od leta 2004 trdno uveljavil v raziskavah institucionalizacije upravljanja v MO, ostaja analitično nedorečen (Gehring in Faude 2013). V odziv na to vrzel sta Alter in Raustiala (2018, 331–333) pojem opredelila bolj celovito, kot »skupek prekrivajočih se in nehierarhično urejenih institucij, ki vključuje več kot en mednarodni dogovor ali MVO s pristojnostmi odločanja«. Raziskovalca pojasnujeta tudi razlikovanje med »režimskim kompleksom« in »režimsko kompleksnostjo«, pri čemer slednja označuje mednarodni politični sistem globalnega upravljanja, ki nastaja kot rezultat soobstoja goste mreže pravil in več režimskih kompleksov (prav tam). Režimsko kompleksnost, torej sestavljeno institucijo, ki deluje znotraj širšega sistema globalnega upravljanja, opredelita s tremi ključnimi elementi: 1. elementarne institucije, ki težijo k pridobitvi pristojnosti odločanja o določeni problematiki oz. ozemlju, 2. odsotnost hierarhične ureditve, 3. sistemski učinek (prav tam).

Režimski kompleksi imajo edinstvene lastnosti (Orsini in Le Prestre 2019, 4), saj jih zaznamujejo vzorci in procesi, ki nastajajo kot posledica interakcij njihovih sestavnih elementov in vplivov okolja (Jervis 1997). Dinamiko interakcij med institucijami na preseku mednarodnih režimov, npr. med režimom mednarodnega varstva beguncev in režimom MVČP, tako opredeljujejo elementi režimske kompleksnosti, ki so hkrati vpeti v širše politične trende globalnega upravljanja. Kompleksnost in upravljanje temeljita na načelu, da v odsotnosti vlade upravljanje poteka »s pomočjo procesov in institucij«, ki delujejo na različnih ravneh in področjih (Duit in Galaz 2008, 318).

Tekmovalnost in težnja akterjev po pristojnosti odločanja, tj. prvi element režimske kompleksnosti, imata osrednji vlogi pri vzpostavljanju režimske kompleksnosti, manj pomembni pa sta število institucij in vrsta režima (Alter in Raustiala 2018, 332). Institucije s prekrivajočimi se mandati, ki se bojujejo za pristojnost odločanja, zaznamujejo prepletena pravila ter podobno članstvo, kar lahko spodbudi razvoj tekmovanja ali sporov o interpretaciji pravil in njihovi vsebini (Eilstrup-Sangiovanni in Westerwinter 2022). Konflikti se pogosteje pojavljajo tam, kjer se članstvo institucij razlikuje, vendar lahko divergentne interpretacije izhajajo tudi iz različnih institucionalnih mandatov (Alter in Raustiala 2018).

Drugi element režimske kompleksnosti, pomanjkanje hierarhije med elementarnimi režimi, vzpostavlja razliko med mednarodnimi in notranjepolitičnimi režimskimi kompleksi. Brosig (2019, 13) pojasnjuje, da gre za navezavo, ki omogoča povezovanje koncepta deljene avtoritete z upravljanjem brez vlade, učinkovanje tega elementa pa je razvidno na preseku režimov. Tu se odpira vpogled v dinamiko odnosov, ki potekajo med raznolikimi elementarnimi institucijami, ki želijo odločevalsko moč. Institucije namreč oblikujejo svoje poskuse vplivanja v kontekstih, v katerih se prekrivajo njihovi mandati in konflikti zahtev (prav tam).

V sodobnem mednarodnem sistemu je tako skoraj nemogoče najti področje, ki bi ga bilo mogoče učinkovito obravnavati le v okviru ene same institucije. Režimi, organizacije in institucije se učijo drug od drugega ter se prilagajajo spreminjajočemu se okolju (Orsini in Le Prestre 2019, 5). Tu v ospredje stopi še tretji element režimske kompleksnosti, tj. sistemski učinek, ki ima ključno vlogo pri vzdrževanju in reprodukciji režimske kompleksnosti (Alter in Raustiala 2018, 333). Interakcije med subjekti in posledice teh interakcij namreč določajo razvoj in stabilnost režimskega kompleksa ter vplivajo na oblikovanje strategij in odločitev v posameznih režimih (Iida 1993, Jervis 1997, Alter in Raustiala 2018).

Politika režimske kompleksnosti: politični trendi in njihov vpliv na odnose med institucijami

Zmožnost prilagajanja režimskega kompleksa je pogojena z dejavniki, ki oblikujejo razmere, v katerih se posamezni kompleksi razvijajo, zato je potrebno pozornost nameniti tudi virom sprememb in učinkovanja (Orsini in Le Prestre 2019, 6). Ker pa so 21. stoletje zaznamovale naraščajoča institucionalna zapletenost ter večplastne dvoumnosti v luči številnih kriz, so pomanjkanje nadzora še posebej občutili odločevalci, ki poskušajo ponovno vzpostaviti pristojnost odločanja. Orsini in Le Prestre (2019, 2) opozarjata, da se kljub izboljševanju orodij za »iskanje reda in povrnitev nadzora nad družbo in okoljem« dejanska zmožnost učinkovitega nadzora vseeno zmanjšuje. V razmerah, v katerih globalne problematike postajajo vse bolj prepletene, namreč pridobivajo pomen politični dejavniki, ki »delajo režimsko kompleksnost neizogibno« in odločilno vplivajo na procese upravljanja ter vedenje institucionalnih akterjev (Alter in Raustiala 2018, 337).

Širok razpon mednarodnih dogovorov in institucij, ki se prekrivajo in pogosto vstopajo v konflikte, tako danes predstavlja realnost večine področij globalnega upravljanja (Kreuder-Sonnen, Schmotz in Zürn 2025). To pomeni, da je reševanje novih problematik, ne da bi upoštevali tematike in ureditve v sorodnih režimih, vse težje. Kompleksnost dodatno povečuje rastoča gostota institucionalnih interakcij, ki ima posledice tudi na področju pravne (ne)usklajenosti: pojav, ki ga analize režimske kompleksnosti prepoznajo kot enega ključnih stranskih učinkov medsebojno prekrivajočih se institucionalnih okvirjev (Raustiala in Victor 2004; Raustiala 2013).

Prav zasičenost z nejasnostmi in pravnimi protislovji je namreč postala eden prvih prepoznavnih znakov delovanja režimskih kompleksov (Gomez-Mera 2021, 11). Prekrivanja med režimi pogosto ustvarjajo trajna območja pravne nekonsistentnosti, kjer pravila med seboj niso skladna ali pa povzročajo razlike v interpretaciji (Alter in Raustiala 2018, 301). V teh kontekstih države oblikujejo različne strateške odzive, od ponotranjenja nejasnih pravil in prilagajanja obstoječim pravnim okvirjem do prizadevanj za preoblikovanje ali vnovično pogajanje o veljavnih dogovorih. Poleg tega se države pogosto odzovejo z ustanavljanjem novih institucij, kar zmanjšuje pritisk na organizacije s preširokim mandatom ali preobremenjenost s pristojnostmi (Drezner 2009, 66).

Trend oblikovanja novih institucij neposredno povzroča težave pri reformiranju obstoječih struktur globalnega upravljanja. V številnih primerih se namreč izkaže, da je učinkoviteje oblikovati novo institucijo kot preoblikovati že uveljavljeno (Alter in Raustiala 2018, 337). Takšne odločitve so lahko rezultat neuspešnih pogajanj, ko »porazene« države ne uspejo izvesti reform ali povečati zastopanosti znotraj obstoječih institucij (Urpelainen in Van de Graaf 2015, 174). Ustaljeno delovanje mednarodnih institucij je namreč težko spremeniti, saj te pogosto varujejo interese nekdanjih vodilnih sil oziroma ustanoviteljic (Alter in Raustiala 2018, 337).

Obstoječi sistem globalnega upravljanja tako novim in vzpenjajočim se silam omogoča izbiro med dvema glavnima strategijama: poskusom preoblikovanja obstoječih institucij ali ustanovitvijo novih (De Búrca, Keohane in Sabel 2013; Ikenberry in Lim 2017). Tudi uveljavljene sile pa se lahko odločijo za preusmeritev delovanja v režime, ki bolj ustrezajo njihovim interesom ali normativnim preferencam (Helfer 2004). Ta proces prispeva k visoki institucionalni diferenciaciji sodobnega globalnega sistema upravljanja in odraža širši premik k specializaciji in funkcionalni diferenciaciji (Zürn in Faude 2013, 120; Alter in Raustiala 2018, 338).

V kontekstu novejših globalnih izzivov, kot so npr. mešani migracijski tokovi, se omenjene značilnosti tega trenda kažejo v stalnem pojavljanju novih problematik, ki ustvarjajo potrebo po vzpostavitvi dodatnih mehanizmov upravljanja. Države v ta namen vse pogosteje pooblaščajo regionalne organizacije, ki oblikujejo politike, osredotočene na lokalne ali regionalne prioritete (Lavenex in Piper 2021). Toda mandati takšnih institucij se pogosto prekrivajo z mandati globalnih MVO, kar vodi do ponovnih napetosti, značilnih za režimske komplekse. Kljub temu učinki lokalnega upravljanja, delovanja specializiranih agencij in nedržavnih akterjev v okviru režimske kompleksnosti v MO ostajajo premalo raziskani.

Kategorizacija preseka: (ne)učinkovito sodelovanje na preseku režimov

Na podlagi analize političnih trendov, ki vplivajo na elemente režimske kompleksnosti in na interakcije na preseku posameznih režimov, je mogoče oblikovati tipologijo režimskih presekov. Učinkovitost sodelovanja na preseku je namreč odvisna od zmožnosti institucij, da zmanjšujejo in rešujejo probleme,

zaradi katerih so bile vzpostavljene, ter da vplivajo na vedenje in odločitve svojih članic (Levy, Young in Zürn 1995; Young 1999; Gomez-Mera 2015, 7). Takšen pristop omogoča razvrstitev presekov v različne kategorije glede na to, ali prispevajo h krepitvi ali ogrožanju reševanja problematik ter v kolikšni meri vplivajo na vedenje akterjev na presečišču režimov.

Tabela 1: TIPOLOGIJA PRESEKOV V REŽIMSKI KOMPLEKSNOSTI

		STRATEGIJE AKTERJEV	
		SODELUJOČE	NESODELUJOČE
UČINEK PRELIVANJA	pozitiven	(1) sinergičen oz. za sodelovanje ugoden scenarij	(2) (potencialno) moteč scenarij
	negativen	(3) (potencialno) konstruktiven scenarij	(4) preprečujoč (škodljiv) scenarij

Vir: Gomez-Mera (2015, 8).

Prvi, sinergični scenarij zaznamujejo pozitivna funkcionalna prelivanja in povratni učinki med prekrivajočimi se režimi. Sodelovanje v okviru ene institucije spodbuja doseganje ciljev druge, kar vodi v celovitejše in stabilnejše upravljanje kompleksa. Takšno pozitivno prekrivanje pogosto izhaja iz večinstitucionalnih strategij držav, ki so namenjene krepitvi sodelovanja in usklajevanju institucionalnih praks (Gomez-Mera 2015, 7). Sinergijo spodbuja tudi delitev dela med institucijami, kar prispeva k stabilizaciji odnosov na preseku (Gehring in Faude 2010, 2013, 2014). V tem okviru pomembno vlogo odigrajo nedržavni akterji, ki z uporabo forumov promovirajo svoje normativne agende ter vplivajo na način, kako se institucije lotevajo posameznih problematik. Na področjih, kjer prihaja do prekrivanja pravnih pravil, ti akterji pogosto predlagajo razvoj komplementarnih norm ali pa skušajo obstoječa pravila preinterpretirati znotraj drugih institucionalnih okvirov (Gomez-Mera 2015, 7).

Drugi, moteči scenarij prav tako zaznamuje pozitiven učinek prelivanja, vendar v okoliščinah, kjer akterji presek izrabljajo predvsem za uveljavljanje svojih lastnih interesov. Takšno ravnanje spodkopava skladnost delovanja in zmanjšuje učinkovitost implementacije politik. V ospredje stopijo distribucijske dinamike in tekmovalnost med akterji, pri čemer države pogosto posegajo po strategijah forumskega »nakupovanja« in »premikanja med režimi«, da selektivno uveljavljajo tiste obveznosti, ki jim najbolj ustrezajo (Gomez-Mera 2015, 8). Forumsko nakupovanje vključuje strateško izbiro foruma, v katerem so pričakovani ugodnejši izidi, medtem ko premikanje med režimi pomeni dolgotrajnejšo strategijo, ki lahko vključuje tudi elemente selektivne implementacije ali ustvarjanja nekonsistentnosti z namenom preoblikovanja širšega institucionalnega konteksta (Alter in Meunier 2009, 13). Takšne prakse zmanjšujejo učinkovitost sodelovanja, njihovi negativni učinki pa so odvisni od tega, ali pozitivno prelivanje uspe nadomestiti posledice oportunističnega ravnanja držav (prav tam).

Tretji, konstruktivni scenarij se pojavi, kadar je učinek prelivanja negativen, torej kadar sodelovanje v okviru ene institucije ovira doseganje ciljev drugega režima. Kljub temu akterji prepoznajo priložnosti, ki jih ponuja institucionalno prekrivanje, in se še vedno zavzemajo za sodelovanje (Gomez-Mera 2015, 9). V okviru tega scenarija se negativnemu učinku prelivanja akterji zoperstavijo s strategijami sodelovanja, učinkovitost njihovega sodelovanja pa je odvisna od ravnotežja med negativnimi učinki prelivanja in uspešnostjo implementacije sodelovalno naravnanih strategij.

Četrty, preprečujoči scenarij predstavlja kombinacijo negativnega učinka prelivanja in oportunističnega delovanja akterjev. Ti izrabljajo institucionalna prekrivanja, da obidejo mednarodnopravne obveznosti ter za onemogočanje učinkovitega reševanja mednarodnih problematik. Alter (2018, 17) pri tem izpostavi tri pogoste strategije legitimacije nacionalnih politik: 1. nadomeščanje mednarodnopravnih pristojnosti z naslavljanjem pristojnosti notranjega prava; 2. nadomeščanje pristojnosti določene veje mednarodnega prava z izpostavitvijo druge veje mednarodnega prava; 3. uporaba komunikacijskih akcij, s katerimi države sporočajo, da mednarodnega prava ni vredno spoštovati.

Iz pregleda literature o režimski kompleksnosti v MO izhaja, da obstajajo različni pristopi k pojmovanju sestavin kompleksnosti, ključnih dejavnikov in relevantnih strategij. Večina teh raziskav pa ostaja državocentrična, zaradi česar bolj pomanjkljivo zajame dinamike na področjih in presekih, kjer ključno vlogo igrajo nedržavni akterji, ki uporabljajo večinstitucionalne strategije.⁴ Ta vrzel so po letu 2015 le postopno začeli zapolnjevati raziskovalci, ki se osredotočajo na razširjeno interpretacijo režimske kompleksnosti, na vključevanje širšega nabora dejavnikov in na analizo presekov, v katerih so nedržavni akterji pomembni nosilci normativnih sprememb (Gomez-Mera 2015; Alter in Raustiala 2018; Eilstrup-Sangiovanni in Westerwinter 2022).

Izhajajoč iz teh spoznanj je za operacionalizacijo analize preseka mednarodnih režimov varstva beguncev in MVČP kot področja, ki ga zaznamujejo močni normativno usmerjeni nedržavni akterji, potrebna prilagoditev analitičnega okvira, ki odraža takšno sestavo preseka. Analiza proučevanega preseka tako temelji na predpostavki, da je dinamika institucionalnih odnosov v režimskih kompleksih odvisna od: 1. elementov režimskega kompleksa, 2. širših političnih dejavnikov, ki vplivajo na dinamiko na preseku, 3. učinka prelivanja med režimi in 4. strategij, ki jih akterji na preseku uporabljajo.

⁴ Več o težavi državocentričnosti v MO tudi v Hedžet (2023).

REŽIMSKA KOMPLEKSNOST NA PRESEKU MEDNARODNEGA REŽIMA VARSTVA BEGUNCEV IN MEDNARODNEGA REŽIMA VARSTVA ČLOVEKOVIH PRAVIC

V analizi režimske kompleksnosti na primeru prepleta mednarodnih režimov varstva beguncev in MVČP proučujemo vpliv prepleta na delovanje mednarodnih akterjev in učinkovanje pogojev režimskega prekrivanja na proučevanem preseku na spodbujanje oz. omejevanje uresničevanja ciljev mednarodnega sodelovanja. V prvem koraku se osredotočimo na analizo kompleksnosti na preseku režimov, zasnovane na aplikaciji elementov režimske kompleksnosti in izpostavitvi političnih trendov, ki zaznamujejo dinamiko na preseku režimov. Analiza kompleksnosti na preseku pomeni temelj za kategorizacijo proučevanega preseka, ki v drugem koraku omogoča preučitev učinkov režimske kompleksnosti na delovanje akterjev ter na oblikovanje strategij in dinamike interakcij med akterji. Te predstavljajo potencialne prednosti in slabosti za razvijanje učinkovitih rešitev za mednarodne problematike. Kompleksnost je namreč lahko tako vir sodelovanja kot vir konflikta.

Elementi in dejavniki režimske kompleksnosti na preseku mednarodnega varstva človekovih pravic in mednarodnega varstva beguncev

Mednarodna skupnost je oblikovala mednarodni režim varstva beguncev, da bi naslovila razmere, v katerih pride do zloma odnosa med državo in državljani. Za legitimnost mednarodne skupnosti je temeljno spoznanje, da imajo ljudje, ki v svoji državi nimajo zagotovljenega dostopa do temeljnih človekovih pravic, pravico do bega (Betts 2013, 1). Institucionalizacija omenjenega spoznanja se je začela ob koncu prve svetovne vojne, ko so bili pod okriljem Društva narodov oblikovani zametki režima varstva beguncev (Loescher, Betts in Milner 2008, 8), nadaljevala pa se je po koncu druge svetovne vojne z institucionalizacijo sodobnega režima varstva beguncev in izgradnjo režima MVČP.

Mednarodna režima sta se zgodaj prepletla, prepletenost pa se je postopno še povečevala (Haddad 2008, 84). Vendar je za oblikovanje sklepov o umestitvi preseka treba opraviti najprej analizo režimske kompleksnosti, utemeljeno na proučitvi 1. elementarnih institucij, 2. sporov o pristojnosti odločanja o problematikah, 3. hierarhične ureditve med institucijami, delujočimi na preseku, 4. sistemskega učinka. Ta okvir omogoča umestitev preseka režimov v zastavljeno kategorizacijo na osnovi zaključkov o ravnotežju med funkcionalnim prelivanjem in strategijami akterjev.

Temelj sodobnega režima varstva beguncev izhaja iz Konvencije o statusu beguncev⁵ in dodatnega Protokola o statusu beguncev,⁶ ki opredeljujeta, kdo

⁵ Konvencija o statusu beguncev, sprejeta 28. julija 1951, po konferenci v Ženevi, organizirani skladno z resolucijo GS št. 5/429, sprejeta 14. decembra 1950, v veljavi od 22. aprila 1954.

⁶ Protokol o statusu beguncev, sprejet 16. decembra z resolucijo GS ZN št. 2198 (XXI), v veljavi od 4. oktobra 1967.

pripada kategoriji »beguncev« in pravice, ki beguncem pripadajo. Tretji element režima predstavlja Visoki komisar Združenih narodov za begunce (*United Nations High Commissioner for Refugees* – UNHCR), ustanovljen leta 1949 kot organ Generalne skupščine (GS ZN) na osnovi Ustanovne listine (UL) OZN (22. člen) zaradi nezadovoljstva z delovanjem Mednarodne begunske organizacije.⁷ Mandat UNHCR je bil določen leta 1950 s Statutom UNHCR (1950),⁸ ki opredeli UNHCR kot nepolitično institucijo humanitarne narave (UNHCR, 2010, 2) in preambulo Konvencije o statusu beguncev (31. člen), ki določi pristojnost UNHCR za nadzor izvajanja konvencije.

Začetek mandata UNHCR, januarja 1951, je bil omejen na tri leta. Podaljševanje mandatov pa se je zaključilo leta 2003, ko je GS OZN mandat podaljšala do razrešitve težave begunstva (UNHCR 2019). Da je glavna funkcija UNHCR mednarodna zaščita beguncev, je potrdila GS OZN leta 1974.⁹ UNHCR je tako edina organizacija z eksplicitnim mandatom zagotavljanja varstva beguncev (Loescher, Betts in Milner 2008, 73), njegov mandat pa je bil na prehodu tisočletja na osnovi sklepov izvršnega odbora (IO) UNHCR in resolucije GS OZN (1999, 16. odst.) razširjen še na zaščito notranje razseljenih ljudi.¹⁰

Tudi proces oblikovanja režima MVČP je temeljno zaznamovala izkušnja preganjanja med drugo svetovno vojno, zato je mednarodna skupnost podprla splošnost (univerzalnost) človekovih pravic, umestila človekove pravice na mesto osrednje teme delovanja institucij (Roter 2016, 713) in pravice vključila v mednarodnopravne pogodbe (Banchoff 2011, 23). Oblikovanje temeljev režima MVČP je zaznamovalo oblikovanje OZN, sprejetje UL OZN in Splošne deklaracije človekovih pravic (SDČP).¹¹ SDČP predstavlja tudi oblikovanje prve povezave med režimoma, saj vsebuje kodifikacijo načela nevračanja (SDČP 1948, 14. člen), ki je zaznamovala razvoj normativnega okvirja varovanja beguncev (Loescher, Betts in Milner 2008, 11).

Oblikovanje režima MVČP na globalni ravni je nadalje zaznamovalo oblikovanje vzporednih nadzornih mehanizmov, ki predstavljajo pomembne akterje v globalni mednarodni skupnosti. Takšno preoblikovanje je najizrazitejše v okviru ukinitve Komisije za človekove pravice, oblikovanja Sveta za človekove pravice in institucije Visokega komisarja za človekove pravice, ki ga je GS OZN zadalžila

⁷ Mednarodna begunska organizacija je bila medvladna organizacija, ustanovljena 20. aprila 1946 z namenom reševanja obsežnega begunsko-migracijskega problema, ki ga je povzročila druga svetovna vojna. Formalni sporazum o njeni ustanovitvi je začel veljati leta 1948, ko je postala specializirana agencija OZN. Organizacija je prevzela večino nalog nekdanje Uprave OZN za pomoč in obnovno ter delovala kot osrednja institucija za repatriacijo, preselitev in zaščito razseljenih oseb v povojni Evropi. Svoje delovanje je uradno zaključila leta 1952 (Bradley, Madokoro, Erdilmen in Chanco 2022, 174).

⁸ Statut Urada visokega komisarja ZN za begunce, sprejet 14. decembra 1950, v prilogi resolucije GS št. 428 (v).

⁹ Resolucija GS ZN št. 3274, sprejeta 10. decembra 1947.

¹⁰ Resolucija GS ZN, št. 533/125, sprejeta 12. februarja 1999.

¹¹ Splošna deklaracija človekovih pravic (1948). Sprejeta z resolucijo GS ZN št. 217 A(III), 10. decembra.

za koordinacijo OZN na področju varstva človekovih pravic (Roter 2016, 720).¹² Z oblikovanjem Urada Visokega komisarja za človekove pravice (*Office of the United Nations High Commissioner for Human Rights* – OHCHR) je GS OZN naslavljala dvome o učinkovitosti režima MVČP (Flood 1998, x), zato je v mandat umestil, poleg koordinacijske funkcije, tudi izdajo priporočil relevantnim agencijam ter diplomatsko in zagovorniško delo na področju človekovih pravic (Resolucija GS OZN št. 48/141 1993, op. 4 (b–i); Clarke 2002, xix).

Zaradi spremenjenih migracijskih trendov pa je mogoče zaslediti, da OHCHR predstavlja tudi institucijo, dejavno na področju migracij. To razkriva njeno sodelovanje v Globalni skupini za migracije (*Global Migration Group* – GMG), sestavljeno iz najpomembnejših MVO na področju migracij. GMG krepi koordinacijo med organizacijami glede vprašanj, povezanih z migracijami. OHCHR pa v okviru GMG deluje na področju ozaveščanja o človekovih pravicah migrantov in komplementarni zaščiti (OHCHR 2019).

Načelo komplementarne zaščite je tesno povezano z regionalnimi sistemi za varstvo človekovih pravic, ki sodelujejo pri opolnomočenju v zvezi z globalnimi političnimi procesi in razjasnitvi mednarodnopravnih pravil (Smith 2007, 80–82). To je jasno v primeru evropskega varstva človekovih pravic, oblikovane v okviru Sveta Evrope. Evropska komisija za človekove pravice,¹³ tj. nadzorno telo, ustanovljeno po določilih t. i. Evropske konvencije o varstvu človekovih pravic in temeljnih svoboščin (EKČP),¹⁴ je namreč že v 60. letih oznanila, da je tudi EKČP, ki ne vsebuje eksplicitnih navedb načela nevračanja, relevantna v primeru prisilnih odstranitvev, ker prepoveduje mučenje, nečloveško in ponižujoče ravnanje in kaznovanje (3. člen). Relevantna določila o varstvu beguncev je mogoče zaslediti še v mednarodnopravnih pogodbah o človekovih pravicah,¹⁵ ki določajo tudi pravice prosilcev za azil in beguncev, četudi znotraj Konvencije o statusu beguncev te niso opredeljene (McAdam 2007, 30).

Tekmovalnost in težnja po avtoriteti s strani akterjev nadalje igrata pomembno vlogo pri vzpostavljanju režimske kompleksnosti (Alter in Raustiala 2018, 332), ker upravljanje usmerjajo institucije in procesi, osredotočeni »na specifične vsebine,« ki »vključujejo akterje z raznolikimi oblikami avtoritete« (Duit in Galaz 2008, 318). Vprašanje pristojnosti je zaznamovalo tudi delo UNHCR, ki že od začetka delovanja natančneje definira svojo vlogo ter področje dela v režimu varstva beguncev (Loescher, Betts in Milner 2008, 85). Prvi večji izziv je UNHCR predstavljalo oblikovanje regionalnih institucij, ki so izpostavile

¹² Resolucija GS ZN št. 48/141, sprejeta 20. decembra 1993.

¹³ Evropska komisija za človekove pravice je prenehala obstajati leta 1998, ko je bilo ustanovljeno Evropsko sodišče za človekove pravice (Informacijski urad Sveta Evrope 2019).

¹⁴ Konvencija o varstvu človekovih pravic in temeljnih svoboščin, ki jo je sprejel Odbor ministrov Sveta Evrope, 4. novembra 1950 v Strasbourgu, v veljavi od 3. septembra 1953.

¹⁵ Mednarodni pakt o državljanskih in političnih pravicah sprejet z resolucijo GS ZN št. 21/2200A, z dne 16. decembra 1966, v veljavi od 23. marca 1976. Konvencija proti mučenju in drugim krutim, nečloveškim ali poniževalnim kaznim ali ravnanju, sprejeta z resolucijo GS ZN št. 39/46 10. decembra 1984, v veljavi od 26. junija 1987.

nepripravljenost sistema na pojav beguncev v neevropskem kontekstu (Haddad 2008, 154). Spoznanje je botrovalo ustanovitvi regionalnih mehanizmov. Komisija za probleme beguncev v Afriki je kot prva zasnovala Konvencijo Organizacije afriške enotnosti o beguncih (1. člen),¹⁶ ki jo zaznamuje širša definicija begunca, ki vključuje tudi posameznike, prisiljene zapustiti svojo državo zaradi zunanje agresije, okupacije ali dominacije. V obdobju hladne vojne pa so UNHCR izzvale še spreminjajoče se preference držav zaradi sprememb v delitvi moči (Loescher, Betts in Milner 2008, 30–31), kar je OZN naslovlila z razširitvijo koordinacijske vloge UNHCR.¹⁷

Nadalje so se v 80. letih 20. stoletja zaostriale azilne politike zaradi povečanih migracij iz razvijajočih se držav (Loescher, Betts in Milner 2008, 33). V ZDA je to leta 1980 povzročilo »begunsko krizo«, ki jo je spodbudilo visoko število zakonitih prosilcev za azil, indokitajskih beguncev in neregularnih iskalcev azila, kar je okrepilo javno nezadovoljstvo (prav tam). ZDA so odgovorile s preusmerjanjem ladij, omejevanjem dostopa do azila in množičnim vračanjem. UNHCR je proti tej politiki protestiral in opozarjal na kršitve mednarodnega prava, a so ZDA sledile tudi druge razvite države (Ghezelbash 2018). Ob tem so financerke UNHCR začele preusmerjati sredstva k nevladnim organizacijam, zaradi česar UNHCR ni več zmožel zadostno naslavljati potreb beguncev. Visoki komisar Hocke je zato izvedel reformo, ki je omejila vlogo UNHCR pri pravni zaščiti in okrepila njegovo usmerjenost v spodbujanje vrnitev (Loescher, Betts in Milner 2008, 38).

Trditev, da UNHCR ni bil zasnovan za obravnavo množičnih preseljevanj, se je znova potrdila v 90. letih, ko je njegova vloga postopno prešla od zagotavljanja mednarodne zaščite k upravljanju migracij in zniževanju standardov za vračanje beguncev, hkrati pa se je vse pogosteje povezoval z nevladnimi organizacijami s področja razvoja (prav tam). V tem obdobju se je povečala tudi pozornost do notranje razseljenih oseb, medtem ko so zaporedne humanitarne krize krepile zahteve po institucionalnih reformah OZN. Kljub temu pa je v političnem in javnem diskurzu naraščalo negativno dožemanje begunstva kot varnostne in družbene grožnje (Loescher, Betts in Milner 2008, 51).¹⁸

Element umanjkanja hierarhije med elementarnimi režimi pa nadalje odpira vpogled v dinamiko odnosov med različnimi režimi. Akterji, katerih pristojnosti posegajo na presek, namreč oblikujejo zahteve znotraj prekrivajočih se režimov, vendar mednarodno pravo tu ne določa hierarhije. Z vidika prekrivajočih se institucij je ključna dinamika medinstitucionalnega delovanja OHCHR in UNHCR, saj se njuna mandata delno vsebinsko prekrivata (varstvo beguncev

¹⁶ Konvencija, ki ureja posebne vidike begunske problematike v Afriki, podpisana 10. septembra 1969 v Adis Abebi, v veljavi od 20. junija 1974.

¹⁷ Resolucija Ekonomskega in socialnega sveta ZN št. 2011, z dne 2. avgusta 1976. Resolucija GS ZN št. 31/35, z dne 30. novembra 1976.

¹⁸ To razširjeno razumevanje begunstva kot grožnje družbeni koheziji in stabilnosti je v zahodnih državah spodbudilo razvoj instituta t. i. začasne zaščite (Loescher, Betts in Milner 2008, 53–54). Ta pristop je zmanjšal legitimnost mednarodne zaščite in prenesel odgovornost za begunce z mednarodnopravnih mehanizmov na humanitarne oblike pomoči (Fitzpatrick 2000, 281).

in varovanje pravic prisilnih migrantov) (Betts 2010, 128). Težavo pa na preseku pomeni pomanjkljiva interpretacija prava človekovih pravic v primeru migrantov, ki nimajo urejenega statusa, saj ima na normativni ravni OHCHR težave pri interpretaciji prava človekovih pravic, ki je relevantno dotičnemu kontekstu (Betts 2009, 8). Migranti brez urejenega statusa v praksi tako pogosto nimajo dostopa do zaščite, ker mandat OHCHR tu ni jasen (Betts 2010, 128).

Obravnava takšnih migracij tako poteka predvsem v okviru vpeljevanja individualnih rešitev s strani akterjev (npr. agencijskih pobud ali ukrepov nevladnih organizacij). Prav v okviru humanitarno usmerjenih nevladnih organizacij, ki v odzivu na problematiko prisilnih migracij težijo k vključevanju zagotavljanja zaščite v svoje »mandate«, pa se »humanitarna pomoč« preoblikuje v »(humanitarno) zaščito« (Zetter 2014, 47). Ta vpeljana pluralnost omogoča neusklajeno odzivanje na izzive prisilnih migracij in vzpostavlja dvotiren sistem zaščite. V tem sistemu potrebo po izboljšanju standardov zaščite v regijah globalnega juga, ki nosijo večji del bremena migracij, promovirajo države globalnega severa, ki uvajajo omejujoče ukrepe in ne želijo deliti bremena (Kale 2017).

Spremembe v enem delu sistemov režimskih kompleksov, zaradi medinstitucionalnih interakcij, ki vplivajo na razvoj režimske kompleksnosti, vplivajo tudi na druge dele (Paravantis 2016, 53–56). Sistemsko učinkovanje na proučevanem preseku razkrivata sprejetji Globalnega dogovora o varnih, urejenih in regularnih migracijah (Globalni dogovor o migracijah) in Globalnega dogovora o beguncih leta 2019.¹⁹ Dogovora sta rezultat procesa, ki se je uradno začel v letu 2016, ko je GS OZN zaradi t. i. »begunske krize« sprejela Newyorško deklaracijo.²⁰ Že desetletje pred tem pa je potekal medvladni proces v okviru dialoga OZN na visoki ravni o mednarodnih migracijah in razvoju, kjer je Generalni sekretar OZN v odgovoru na priporočila Svetovne komisije za mednarodne migracije oblikoval GMG (Global Migration Group 2019). GMG je nasledila Ženevsko skupino o migracijah, oblikovano leta 2003, ki je vzpostavljala medagencijski dialog, da bi izboljšala »konsistentnost politik in združila strokovno znanje« v OZN (Micinski in Weiss 2018, 12). Delo GMG je uspelo povečati koordinacijo prispevkov agencij OZN k forumu o migracijah in razvoju, okrepilo je sodelovanje znotraj sektorja in migracije umestilo v deset ciljev Agende 2030 o trajnostnem razvoju (prav tam).

Globalna dogovora imata zaradi nezavezujoče pravne narave omejeno normativno učinkovanje (Peters 2018), njun sprejem pa tudi zaradi dialogov medagencijskih skupin, kot je GMG, pomeni prvo umestitev področja migracij v sistem OZN, podprto s strani globalnega severa in juga (Betts in Kainz 2017, 11). V luči evropske t. i. »begunske krize« so v težnji po usklajenem odzivu na povečane prihode države namreč preučevale tudi prispevek mednarodne konference (prav

¹⁹ Globalni dogovor o beguncih, sprejet v okviru poročila Urada visokega komisarja ZN za begunce na 73. zasedanja GS ZN decembra 2018 v New Yorku (UNHCR 2018).

²⁰ Newyorška deklaracija o migrantih in beguncih, sprejeta z resolucijo GS ZN št. 71/L.13. oktobra 2016.

tam). Septembra leta 2016 je potekal Svetovni vrh o obsežnih gibanjih beguncev in migrantov (Svetovni vrh), na katerem je bila sprejeta Newyorška deklaracija, ki vzpostavlja okvir za odziv na večje gibanje beguncev (UNHCR 2016, 4). Na Svetovnem vrhu pa so se udeleženci dogovorili tudi o izvedbi mednarodne konference o mednarodnih migracijah, v okviru katere bo v sprejem na zasedanju GS OZN predlagan Globalni dogovor o migracijah. V primeru Globalnega dogovora o beguncih pa je proces vključeval predložitev osnutka Dogovora o beguncih poročilu UNHCR (Betts in Kainz 2017, 11).

Če je bila umestitev migracij v okvir sodelovanja na ravni OZN še pred desetletjem nepredstavljiva, to po sprejemu dogovorov pojasni učinkovanje sistemskega učinka režimskega kompleksa, ki je proizvod interakcij med enotami analize. Interakcije pa zaznamujejo: samoorganizacija (agencij OZN), razvoj (oblikovanje novih dialogov) in zmožnost prilagajanja (urgentnost hitrega odziva na obsežne prihode). Primer sprejetja globalnih dogovorov razkriva tudi potrebo, da pri oceni upravljanja področja naslovimo učinkovitosti sodelovanja režimov in proučimo njihov učinek na sistemski ravni.

Kategorizacija preseka varstva beguncev in varstva človekovih pravic

Presek mednarodnih režimov varstva beguncev in MVČP opredeljujejo večdimenzionalna vsebina problematike in številčne interakcije akterjev. V kontekstu izpostavljenih interakcij na preseku, osredotočenih na OHCHR in UNHCR, analiza elementov režimske kompleksnosti na preseku razkriva, da tudi nedržavni akterji uporabljajo strategije, usmerjene k medinstitucionalnemu delovanju, ko se povezujejo in vključujejo v dialog. Na preseku režimov MVČP in varstva beguncev so sicer države subjekti, dolžni zagotavljati človekove pravice vseh ljudi, ki so predmet njihove jurisdikcije. Pomembno vlogo v okviru definiranja in zaščite integracijskih standardov beguncev imajo tudi mednarodni in regionalni mehanizmi MVČP, kar sta izpostavila IO UNHCR²¹ in Odbor za človekove pravice.²²

Na podlagi analize elementov režimske kompleksnosti na preseku režimov je mogoče zaslediti veliko dopolnjevanje na področju načel in norm (da Costa 2006, 14–15). Varstvo pravic beguncev v režimu varstva beguncev zaznamujejo dvoumna pravila, ki določajo pravice subjektov. Ker mednarodnopravni okvir natančneje ne opredeljuje postopka za priznanje mednarodne zaščite, države pri razlagi preganjanja sledijo političnim interesom ter uporabljajo nacionalno in regionalno pravo (Khan 2015, 59). Identificirano praznino je UNHCR sicer obravnaval leta 1979,²³ ko je interpretacijo preganjanja utemelji s pomočjo temeljnih vrednot človekovih pravic (UNHCR 1979, odst. 52). Splošne smernice, ki

²¹ Zaključki IO Visokega komisarja za begunce št. 82(XLVII), z dne 17. oktobra 1997, o zaščiti azila (odst. vi).

²² Zaključki Odbora za človekove pravice, Splošni komentar št. 15 o položaju tujcev v okviru Mednarodnega pakta o državljanskih in političnih pravicah 11/04/84, z dne 29. julija 1994, odst. 1.

²³ Priročnik o postopkih in kriterijih za določitev statusa begunca, Ženeva, UNHCR, 1979, odst. 52.

vsebujejo navodila, namenjena zagotavljanju enotnejše interpretacije, so dopolnili tudi drugi pogodbeni odbori OZN.²⁴ Vendar države prekrivajoča se pravila in nezavezujoče smernice na preseku režimov strateško uporabljajo, da prilagajajo merila za dodelitev mednarodne zaščite (Khan 2015, 60).

Učinek prelivanja v proučevanem preseku razkriva tudi načelo komplementarne zaščite. V 20. stoletju so države na svojem ozemlju dovolile namreč ostati tudi posameznikom, ki niso povsem ustrezali merilom definicije begunca, a je bila njihova potreba po zaščiti upravičena (Mandal 2005, 16). »Komplementarna zaščita« tako opisuje varovanje, zasnovano na potrebi po mednarodni zaščiti, izkazani zunaj okvirja begunske konvencije (McAdam 2005, 1). Komplementarna zaščita naj bi prispevala k doseganju ciljev mednarodnopravnih mehanizmov, saj »deluje kot temeljna človekova pravica oz. kot humanitarna zaščita, ki izhaja iz razširjenih dolžnosti držav« (prav tam). Zagotavljala naj bi alternativen vir za zaščito širše skupnosti, vendar akterji komplementarno zaščito v praksi uporabljajo tudi za nižanje standardov zaščite.

To razkriva načelo subsidiarne zaščite v Evropski uniji (EU) (Zagorc in Stare, 2018), ki ga zaznamujeta začasnost statusa ter omejene pravice do prostega gibanja. Ker komplementarna zaščita ni eksplicitno kodificirana v mednarodnem pravu o človekovih pravicah, prihaja namreč do zavez, neskladnih z mednarodnopravnimi obveznostmi (prav tam). Posledično je od vpeljave subsidiarne zaščite v EU mogoče zaznati, da prihaja do zastoja v razlagi Konvencije o statusu beguncev, bolj omejena je tudi njena širša uporaba (Lambert 2013, 18).

Na preseku režimov MVČP in varstva beguncev analiza razkriva še, da režimska kompleksnost razširja možnosti za delovanje mednarodnih akterjev, ki svoje delovanje s čezinstitucionalnimi strategijami usmerjajo po preseku režimov. Vendar pa se delovanje akterjev razlikuje v ciljih: delovanje nedržavnih akterjev je pogosteje usmerjeno k normativni ureditvi področja, države praviloma stremijo k ohranjanju nejasnih pravil in pravnih praznin, delovanje agencij OZN pa je usmerjeno k čezinstitucionalnemu sodelovanju in krepitvi pozitivnega prelivanja, kar pomaga uresničiti tudi njihov mandat.

Delovanje OHCHR glede skupin migrantov v ranljivih položajih je usmerjeno k poudarjanju na človekovih pravicah utemeljenega pristopa k migracijam in uporabnosti komplementarne zaščite, kot dela mehkega prava (npr. Splošna načela in smernice) (OHCHR 2017). OHCHR je tudi ustanovni član GMG, ki je problematiko zaščite temeljnih pravic migrantov povzdignil na globalno raven. V tem procesu je GMG zagotovil manjšo politizacijo sodelovanja na področju upravljanja migracij in omogočil postopno vključitev nevladnih organizacij in držav v pogovore (Atak, Nakache, Guild in Crepeau 2018, 6), ki so spodbudili preoblikovanje dojemanja problematike pravic migrantov v ranljivih situacijah. To preoblikovanje je omogočilo normativno ureditev področja. OHCHR pa je

²⁴ Eden izmed takšnih organov je tudi Odbor za pravice otrok, ki je razlago dopolnil s smernicami za varstvo mladoletnikov brez spremstva v Splošnih smernicah št. 6 (2005).

v tem procesu strateško povezoval forume z namenom vplivanja na dojetanje problematike skozi vključevanje nevladnih organizacij v oblikovanje pravil.

Tudi UNHCR v delovanju poudarja uporabnost mehanizmov človekovih pravic in sodelovanje z institucijami na preseku. Če je v preteklosti oblikovanje novih dokumentov v okviru drugih institucij UNHCR prepoznaval tudi kot grožnjo avtoriteti (Haddad 2008), v 21. stoletju sodelovanje usklajuje z mehanizmi in agencijami OZN. To je razvidno tudi iz oblikovanja Globalnega dogovora o beguncih, saj med snovanjem dogovora UNHCR v ospredje postavil »vprašanje strategije« in »odločitev, da se ne pogaja o določbah, ki že predstavljajo del mednarodnega prava« (McAdam 2018, 571–72). Takšno stališče je tudi posledica dejstva, da se UNHCR sooča z rastjo kršitev Konvencije o statusu beguncev, grožnjami o proračunskih rezih (Betts 2018; Bowcott 2019), v IO UNHCR sedijo tudi države, ki niso pogodbenice Konvencije o statusu beguncev ali kršijo mednarodno pravo (Gammeltoft-Hansen 2018, 607).

Med pripravo osnutkov Globalnega dogovora o beguncih je UNHCR (2018) uporabljal raznolike pristope, zadnji osnutek je vključeval tudi seznam pravic (vključujoč načelo nevračanja, ekonomske in socialne pravice). Vendar so bila iz končne verzije izbrisana državam »sporna« določila (Gammeltoft-Hansen 2018, 609), ki bi otežila uveljavljanje restriktivnih mednarodnopravnih interpretacij, s katerimi države legitimirajo odvračilne ukrepe. Takšno delovanje je ključen del strategij (forumskega »nakupovanja«, premikanja med režimi in strateške nekonsistentnosti), ki jih državni in medvladni akterji uporabljajo na preučevanem preseku. Zahodne države se zatekajo raje k forumom, s katerimi naslavlja obmejno varnost, varnostne preglede in sporazume o vrnitvah (Micinski in Weiss 2018). Države globalnega juga, ki želijo sodelovanje na področju vprašanj pravic delavcev migrantov in združevanja družin (International Centre for Migration Policy Development 2016), pa se zatekajo k regionalnim forumom podobno mislečih držav (npr. Dialog o migracijah za zahodnoafriške države). Trend povezovanja prek neuradnih dialogov je tako mogoče zaslediti že na vseh celinah (Lavenex 2018, 1285).

Med pogosteje uporabljenimi strategijami na preseku je tudi strategija strateških nekonsistentnosti, ko države oblikujejo kontradiktorna pravila v paralelnih forumih, da razširijo interpretacijo pravil, ki jim lahko sledijo na osnovi lastnih interesov (npr. interpretacije, ki omogočajo omejen dostop do azilnega postopka) (McAdam 2018). V EU je bilo to razvidno na primer v letu 2015 oblikovanem načinu upravljanja migracijskih tokov (t.i. pristop žariščnih točk), ki naj bi začasno zagotovil hitrejšo identifikacijo prosilcev za azil, a je prosilcem predvsem preprečeval vstop v EU (Lovec 2017; Majcher 2018).

Takšnim praksam se poskušajo zoperstaviti nadzorni mehanizmi MVČP, ki v svojem delovanju razvijajo razširjeno razlago načela nevračanja (McAdam 2020). Najbolj izrazit primer tega je razviden v delovanju Odbora za človekove pravice, ki se od leta 2015 sooča z izrazitim porastom individualnih pritožb beguncev in prosilcev za azil na podlagi Mednarodnega pakta o državljskih

in političnih pravicah, predvsem tistih, katerih prošnje so bile obravnavane v državah članicah EU. Odbor za človekove pravice pri svojem delu ne le razširja razumevanje načela nevračanja, temveč tudi določa številne kriterije, ki jih je treba upoštevati pri presoji morebitnih kršitev. Vendar pa zaradi velikega števila primerov in pravnih kontradiktornosti prihaja tudi v okviru njegovega delovanja do postopkovnih in vsebinskih nedoslednosti, kar odpira vprašanja o pravičnosti in načelnosti njegovega odločanja ter posameznike pušča v negotovosti glede možnosti uspeha njihove pritožbe (Garett in Barrett 2022, 251).

Proučevan presek režimov se tako uvršča nekje na sredino med motečim in konstruktivnim scenarijem. Komplementarnost preseka, ki ga zaznamuje pozitiven učinek prelivanja, s sprejemom restriktivnih ukrepov na področju azilne politike upada. Na drugi strani je več sodelovanja zaslediti od leta 2016 v okviru vključevanja nedržavnih akterjev in povezovanja državnih in nedržavnih akterjev, aktivnih na preseku (Josefsson in Löw 2025). Prevladujoča strategija akterjev, aktivnih na preseku, je namreč postalo ravno medforumsko povezovanje.

SKLEP

Po svetu je vse več oseb prisiljenih v beg od doma. Večina jih beži zaradi rastočega števila konfliktov ali ker jim v državi grozi preganjanje. V luči dejstva, da 70 % beguncev svojo pot konča v sosednji državi, večji del bremena begunstva leži na državah v razvoju. Vseeno pa je že vse od hladne vojne mogoče zaslediti v razvitih državah razvoj restriktivnejših azilnih zakonodaj, ki namesto zaščite poudarjajo pomen nadzora, preprečevanja migracij in omejevanja dostopa do državljanstva (Zavratnik Zimic 2003, 29).

Ker takšno delovanje redko naleti na trden odziv mednarodne skupnosti, kljub varovalom za spoštovanje človekovih pravic in režimu varstva beguncev, se odpira vprašanje delovanja (učinkov) kompleksne strukture upravljanja mednarodnih odnosov na področju zagotavljanja pravic posameznikom, ki so prisiljeni zapustiti svoj dom. Pričujoč članek zato oblikuje analitični okvir ter naslavlja potrebo po raziskovanju vplivanja strukture mednarodne skupnosti na procese mednarodnega upravljanja področij mednarodnih odnosov skozi prizmo režimske kompleksnosti. Režimski kompleks predstavlja skupek prekrivajočih se in nehierarhičnih institucij, ki upravljajo določeno področje, takšen opis pa je mogoče pripisati tudi preseku režimov MVČP in beguncev, ki smo ga proučili v članku.

Analiza v članku razkrije, da presek med režimom mednarodnega varstva beguncev in režimom MVČP ne pomeni zgolj seštevka dveh institucionalnih sistemov, temveč tvori dinamično polje interakcij, na katerem se odvijajo procesi tekmovanja, usklajevanja in prekrivanja pristojnosti. Prav ta dinamika določa, ali se prelivanje norm in praks med režimoma uresničuje kot sodelovanje ali kot način nesodelovanja. Medtem ko pozitivni učinki prelivanja omogočajo sinergijo, npr. skozi komplementarno uporabo norm človekovih pravic pri zaščiti beguncev, negativni učinki vodijo k motnjam, fragmentaciji in celo spodkopavanju obstoječih mednarodnopravnih standardov.

Analiza delovanja ključnih akterjev, ki je osredotočena predvsem na OHCHR in UNHCR, razkrije še ambivalenten značaj sodelovanja v režimskem preseku. Po eni strani se medagencijski dialogi in skupne smernice o obravnavi prisilnih migracij kažejo kot izraz systemskega učinka režimske kompleksnosti, ki spodbuja institucionalno učenje in krepitev mednarodnega sodelovanja. Po drugi strani pa kompleksnost ustvarja priložnosti za selektivno uveljavljanje obveznosti, kot so forumsko nakupovanje, premikanje med režimi in strateške nekonsistentnosti, ki jih države uporabljajo za legitimizacijo restriktivnih praks in izogibanje mednarodnopravnim obveznostim.

Takšno delovanje razkriva temeljno napetost režimske kompleksnosti: ravno struktura, ki omogoča sodelovanje in inovativno odzivanje na nove globalne izzive, odpira tudi prostor za nesodelovanje in erozijo normativne koherence v mednarodnih odnosih. Presek med režimoma varstva beguncev in MVČP se zato uvršča med moteče in konstruktivne scenarije sodelovanja in predstavlja področje, kjer obstaja potencial za sinergijo, vendar ga pogosto preglasijo tekmovalne strategije in politični interesi držav.

Na tej podlagi članek razkrije, da režimska kompleksnost ni sama po sebi niti pozitivna niti negativna. Njeni učinki so pogojeni z vrsto strategij, ki jih uporabljajo akterji, ter z njihovo pripravljenostjo sodelovati v duhu medsebojnega dopolnjevanja in spoštovanja univerzalnih človekovih pravic in temeljnih mednarodnopravnih načel. Sodelovanje v režimskem preseku se uresničuje, kadar akterji usklajeno uporabljajo instrumente različnih institucij za izboljšanje dostopa do zaščite; nesodelovanje pa nastopi, kadar se institucije ali države v imenu političnih interesov zatekajo k praksam, ki razgrajujejo skupni normativni okvir. Osrednji prispevek članka tako predstavlja nadgrajeno razumevanje dvojne narave režimske kompleksnosti: kot prostora priložnosti za koordinacijo in normativno inovacijo ter kot vira fragmentacije, pravne nejasnosti in erozije solidarnosti.

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REGIME COMPLEXITY AND INTERNATIONAL (NON-)COOPERATION: ANALYSIS OF REFUGEE RIGHTS AT THE OVERLAP OF INTERNATIONAL REGIMES

Abstract. *The article analyses the conditions in which regime overlap stimulates or constrains the goals of international cooperation, and how regime complexity influences the strategies via which actors address the governance of migration in order to ensure access to rights for individuals forced to flee their country. Based on analysis of the elements of regime complexity, the article develops an analytical framework for studying the impact of regime complexity on cooperation at the overlap of the international human rights regime and refugee protection regime. The analysis reveals that regime complexity at this overlap creates opportunities for cooperation that actors exploit to evade less favourable international legal principles, institutions, and mechanisms.*

Keywords: *regime complexity, international cooperation, refugee rights, international human rights regime.*

Gregor POTOČNIK*

ENSURING PUBLIC HEALTH IN WAR AND EMERGENCY SITUATIONS FOR GREATER SOCIAL RESILIENCE

Operationalising Public Health in a State of War or a State of Emergency**

Abstract. State and social resilience is a salient topic in current political and, thus, defence and military strategic decision-making. The increased armament capabilities of states is a consequence of the rise in state and social resilience. Among the general hysteria of increasing military firepower alone, one cannot avoid the feeling that many areas of social resilience, as key state infrastructure, are being ignored. A generally ignored part of critical infrastructure is the area of public health. In this article, a broad outline is provided of the EU and especially the Slovenian public health system, while an operational-tactical plan for public health in emergency or war situations is proposed.

Keywords: public health, disaster medicine, state of war, state of emergency, extraordinary circumstances.

INTRODUCTION

Social awareness of the provision of public health in ECs¹ typically only becomes relevant when sudden, socially all-encompassing and life-limiting changes occur in society. In Slovenia, the national crisis management and response exercise Resilience24 (Odpornost24) ended in October 2024. The aim of the presented research is to examine the: (1) Slovenian and European Union (EU) normative basis for public health provision in extraordinary circumstances (ECs); and (2) factors which influence the effectiveness and efficiency of public

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¹ With the phrase "ECs" we wanted to cover all possible life situations that require rapid action in uncertain circumstances, in the form of actions that are not typical of the usual and established operations of state or international bodies.

health in ECs. The goal is to provide proposals to add to the resilience and effectiveness of public health operationalisation in ECs such as a state of war or state of emergency.

ECs, as shown by the current reality of Slovenian, European and global developments, no longer fit the classical definition of this wording. Today, ECs are almost a normal state of affairs, rationally manifested in areas from climate change to the fierce war underway in Ukraine and the armed conflicts in the Middle East.²

The last time global society became particularly aware of the importance of public health performance in ECs and the impact of such circumstances on public health was during the COVID-19 pandemic (Crnkovič et al. 2024, 22–25; Eržen et al. 2020, 120; Lep and Bandel-Castro 2011; Selan and Vuga Bernšak 2023, 645; Ferlin, Malešič and Vuga Bernšak 2021). For the purposes of this article, ECs are primarily defined only as a state of war or state of emergency according to the Defence Act (*Zakon o obrambi*, ZObr) and the Protection Against Natural and Other Disasters Act (*Zakon o varstvu pred naravnimi in drugimi nesrečami*, ZVNDN), which defines a crisis.

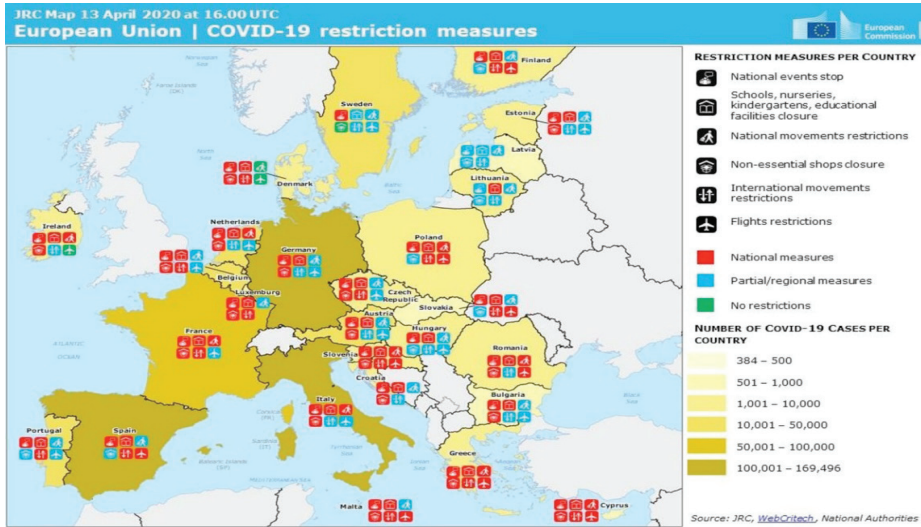
During the COVID-19 pandemic, most European countries, including Slovenia, were not adequately prepared to deal with the extreme circumstances it caused. This lack of preparation was evident in the public health sector and other areas of society (Joint European Roadmap towards lifting COVID-19 containment measures, 2020), with unprecedented challenges and dramatic socio-economic impacts being faced (ibid.). The EU responded in early 2020 (ibid.) by adopting a plan to deal with the consequences. Nevertheless, it was never put into operation as the plan itself stated that we were faced with hitherto unknown situations and circumstances.

Two questions are raised by this: Which normative possibilities for operationalisation already exist in the field of public health in Slovenia in the event of ECs? What normative basis is there in the EU for effective and efficient public health in these circumstances?

Figure 1 reveals a range of approaches to limiting the spread of COVID-19, despite all the countries being EU members. The different actions taken by EU member states affirm the EU's statement that it was faced with unknown situations and circumstances. Countries introduced diverse measures, even if they were neighbouring countries with approximately the same number of infected people, such as Lithuania, Latvia and Estonia or Slovenia, Austria, Croatia and Hungary or Slovakia and the Czech Republic.

² Ukraine and the Middle East suffer enormous collateral damage from war and armed conflict. Collateral damage is most clearly seen in civilian casualties and the destruction of civilian infrastructure. In such circumstances, the public health system, as part of critical infrastructure, has an extremely difficult task if it wants to perform its tasks effectively and successfully. However, Ukraine and the Middle East show us that despite all the difficulties, the public health system has not stopped, but is functioning, even if only at a basic level.

Figure 1: JOINT EUROPEAN ROADMAP TOWARDS LIFTING COVID-19 CONTAINMENT MEASURES



Source: Official Journal of the European Union, 126/01 dated 17 April 2020.

A state of war or state of emergency requires effective, efficient and above all swift action, as demonstrated by the current events in Ukraine. The Defence Act contains provisions for action in such circumstances with regard to civil defence, labour and material duties, which were only partly tested operationally in 2024, and even then merely as part of an exercise. Namely, in 2024 Slovenia organised a national crisis management and response exercise, Resilience24 (Odpornost24), pursuant to the Action Plan (Akcijski načrt za krepitev odpornosti v Republiki Sloveniji, 2023; Načrt vaj v obrambnem sistemu in sistemu varstva pred naravnimi in drugimi nesrečami v letu 2024, 2023). *Resilience24* was the largest crisis management and response exercise ever undertaken in Slovenia. It was chiefly designed to test the resilience of the country and society in ECs. The Critical Infrastructure Act (Zakon o kritični infrastrukturi, ZKI-1) defines 11 critical infrastructure sectors, one of which is the health sector. The public health sector was hence a key training area during the exercise. Similarly, public health is also a criterion for determining which entities are critical under ZKI-1. Slovenian legislation is much broader and more specific than the EU regulations, which before 2022 defined just two critical infrastructure sectors: energy and transport (Council Directive 2008/114/EC of 8 December 2008). Since 2022, the EU also defines 11 critical infrastructure entities (Directive (EU) 2022/2557 of the European Parliament and of the Council of 14 December 2022 on the resilience of critical entities, and repealing Council Directive 2008/114/EC), which are identical to those defined in ZKI-1. In March 2016, the EU adopted a regulation

(Council Regulation (EU) 2016/369 on the provision of emergency support within the Union) which was supposed to provide for the organisation of emergency assistance in the EU. However, the COVID-19 pandemic demonstrated that the regulation was not operational (Lorbek 2021, 8). Slovenia had already designated the health sector as part of critical infrastructure in the Critical Infrastructure Act of 2017, which should have enabled it to be more operational during the COVID-19 pandemic. In spite of this, Slovenia's performance was sub-optimal (Šivec and Gabrovec 2021, 44; Javno zdravje in COVID-19, 2021; Javno zdravje in COVID-19, 2022). Similarly, Slovenian works had been published at least since 2014 on the topic of public health functioning in war, emergency and crisis situations – disaster medicine (Filippini 2015; Čakš et al. 2018; Šubelj 2015) – yet improvisation was still necessary.³

Accordingly, in this article operationalisation of the Minister's powers⁴ under the Act on Intervention Measures in the Field of Health, Labour and Social Affairs and Health Related Subjects (Zakon o interventnih ukrepih na področju zdravstva, dela in sociale ter z zdravstvom povezanih vsebin, ZIUZDS) as realistic as possible is proposed, albeit initially as a training exercise, in the context of a state of war or state of emergency pursuant to the Defence Act. The proposal is motivated by three factors: (a) the COVID-19 pandemic showed that even if we have supranational EU normative resources, they are insufficient to be operationalised on the national level; (b) Slovenia has never tested the powers held by the Minister of Health under ZIUZDS, not even during Resilience24; and (c) modern IT solutions allow for vast social connectivity on social networks, which creates challenges in the area of crowd psychology and, as the COVID-19 pandemic showed, unjustified mistrust in public health.

The article presents the Slovenian normative provisions for operational public health in ECs and the EU normative basis for effective and efficient public health in ECs. Further, a matrix or method as part of the OTP is proposed to facilitate effective and efficient public health in ECs, involving minimum improvisation and maximum predictability.

³ In Slovenia, a textbook in the form of seminars was issued in 2014, entitled Planning and Action in the Event of Sudden Events and Risks to Human Health and Crisis Situations in the Field of Public Health – Disaster Medicine: Seminar for Public Health Specialists 2014. Nonetheless, it did not contribute much to managing the COVID-19 pandemic.

⁴ The Minister may, in accordance with the law, introduce temporary measures focused on healthcare professionals:

1. temporary transfer of healthcare professionals;
2. temporary prohibition or restriction on issuing consent to work with another healthcare provider;
3. temporary prohibition or restriction of concluding business contracts;
4. temporary prohibition or restriction of the use of annual leave and temporary restriction of the right to strike;
5. adapted implementation of internships, secondaries and specialisations;
6. limited implementation of healthcare services in the public healthcare network (e.g., temporary cancellation of non-urgent specialist examinations and interventions, temporary suspension of the implementation of individual preventive healthcare services); and
7. temporary inclusion of providers of non-urgent ambulance transport.

METHODS

The research is based on a comparison of the substantive operationalisation of Slovenian normative acts and operationalisation of EU normative acts with Slovenian legislation, using the method of legal epistemology, the comparative law method, and the evaluation method. It focuses on already implemented normative solutions (*de lege lata*) rather than those yet to be implemented (*de lege ferenda*) in the form of legislative change.

The Model Under Study

In order to answer the questions stated in the introduction, namely, which normative possibilities for operationalisation already exist in the field of public health in Slovenia in the event of ECs, and what normative basis is there in the EU for effective and efficient public health in ECs, we need to:

- a) examine which Slovenian and EU regulations already permit the operationalisation of Slovenian public health in ECs;
- b) determine the best method and format for the effective and efficient operation of public health in such circumstances; and
- c) anticipate how decision-makers and public health and healthcare professionals might react to the proposed solution.

Answers to (a) provide an overview of the normative basis to check the principle of legal predictability in ECs. It would be erroneous to think that an extreme fact, such as the number of dead, influences the decision of the courts. The latter judge solely according to the law (Blažič 2009), and even if one might think that a large number of fatalities allows for a trial outside or above the law, this is not the case (Šugman Stubbs and Mihelj Plesničar 2020, 200–203; Potočnik 2023, 188). Responses to (b) will allow certain content to be put into practice, which should be effective and efficient in operationalising public health in ECs. In the past, several plans were adopted to deal with ECs or crises from the local to the national level (Načrt pripravljenosti na pandemijo gripe 2009; Načrt pripravljenosti na pandemijo gripe na področju zdravstva 2006), yet they failed to achieve the desired results in the COVID-19 pandemic. However, a state of war and a state of emergency are conditions that hold much more serious consequences than those of the COVID-19 pandemic. The warring sides, i.e., the enemy states, first attack the enemy's critical infrastructure, such as the energy sector and transport infrastructure, along with information systems (Galeotti 2022, 34). The existing plans do not refer to any situations foreseeing the functioning of these systems in a state of war or state of emergency, and even working from home, which became widespread during the COVID-19 pandemic, would not be possible. Answers to (c) would help determine the current state of general preparedness and the resilience of employees and decision-makers in the public health sector when putting the emergency response into operational use. In 2020, the President of the Medical Chamber of Slovenia stated the Chamber

had found that healthcare institutions had organised themselves to adapt to the difficult situation caused by COVID-19 (Zdravniška zbornica Slovenije, 2024), showing that the plans then in place were not up to the situation and that healthcare institutions needed to improvise. This led, inter alia, to territorial and substantive inequality in the burden of public health, with healthcare professionals becoming overloaded, and holding far-reaching consequences for the population because a large number of health checks were not carried out at the time of the pandemic (Javno zdravje in COVID-19, 2022).

RESULTS

Normative Analysis

Given that the operationalisation of Slovenian public health in a state of war or emergency is not defined or determined anywhere, one may anticipate that national- and EU-level operations in a state of war or emergency would be similar to those following the outbreak of the COVID-19 pandemic. The EU's rules are not yet developed to the point where all member states are able to override national interests and mainly follow those rules during a state of war or emergency. Nor can support to allies, based on international treaties, be concretised at this point in time.

The Slovenian military standard – STANAG 2068⁵ – establishes criteria for carrying out emergency war surgery in Slovenia. While the standard cannot be applied systematically in the public health field, it indicates the direction of possible development as it is much more specific than some works written on war surgery (Smrkolj 1995; Cubano 2014). Public health sector staff can only start working on the operational level in ECs, like in a state of war or emergency, when the necessary appropriate normative basis has been provided. An appropriate normative basis is required for any official, binding and *de facto* activation of action in ECs. The Resilience24 exercise revealed the two greatest public health challenges will be providing sufficient: (a) staffing; and (b) material supplies. Public health sector staff and sufficient material supply, during a state of war or emergency, should: (a) ensure the functioning of the Slovenian healthcare system; (b) provide support and capabilities to the Slovenian Armed Forces; and (c) provide support to allies. The latter aspect of providing support to allies is often neglected or left unspecified. All three areas hold equal significance, which poses a particular challenge not just in the executive domain, but in the moral and ethical domain as well, as shown following the start of the COVID-19 pandemic when countries were competing selfishly with each other in the procurement and provision of protective equipment and medical supplies.

⁵ Slovenski vojaški standard. STANAG 2068(5), Emergency war surgery = Vojna kirurgija v nujnih primerih. 1. izd. Let. 2068(5). Vrhnika: Ministrstvo za obrambo, Direktorat za logistiko, Urad za opremljanje, Sektor za standardizacijo, kodifikacijo in kakovost; 2012. Vol. 1 (separate pagination).

Figure 2: *THREE MAIN TASKS AND CHALLENGES OF THE SLOVENIAN PUBLIC HEALTH SECTOR DURING A STATE OF WAR OR EMERGENCY*

Operationalization of public health in wartime and emergency situations	
Main tasks	Challenges
a) The functioning of the Slovenian healthcare system	a) Setting priorities
b) Provide support and capabilities to the Slovenian Armed Forces	b) Ensuring a sufficient number of qualified personnel
c) Provide support to allies	c) Ensuring adequate material supply

Source: The author's own work.

Slovenian Legislation

The 2024 Assessment of the Capacity to Manage the Risk of an Epidemic or Pandemic of an Infectious Disease in Humans (Ocena zmožnosti obvladovanja tveganja za epidemije oziroma pandemije nalezljive bolezni pri ljudeh, 2024) suggests improvements to be made in the planning and implementation of interventions, funding and staffing. Slovenian legislation already allows for these proposals for improvements to provide powers and fully operationalise public health in a state of war or emergency if such states have been declared under the Defence Act. The declaration of a state of war or emergency would also mean a state of complex crisis in Slovenia, and simultaneously the activation of the national crisis management and governance system, which the Slovenian government is responsible for under the Government of the Republic of Slovenia Act (Zakon o Vladi Republike Slovenije, ZVRS). The National Security Council (Svet za nacionalno varnost, SNAV) is the government's advisory and coordinating body on all national security issues. The National Security Council Secretariat (Sekretariat Sveta za nacionalno varnost, SSNAV) operates within the National Security Council and operationalises all activities in all areas, including coordination between all state and public authorities and civil society. The Operational Group of the National Security Council Secretariat provides analytical and technical support to the National Security Council Secretariat. The government also makes decisions on the proposal of the responsible minister.

The Slovenian experience shows that, even in a relatively well-coordinated normative area, in times of complex crisis the government does not use all of the already prescribed procedures, or adopts them only in part, which always

ends up in improvisation. This is wrong and unnecessary, as demonstrated by the COVID-19 pandemic. The government failed to organise effective and efficient crisis management and governance, notwithstanding that all the relevant normative foundations were in place. The operation of the entire public administration and part of civil society in Slovenia in a state of war or emergency is defined by defence plans on the basis of the Regulation on Defence Planning. This regulation stipulates that defence plans must be in line with the emerging situation, i.e., with the latest scientific and professional findings on public health.

EU Legislation

The degree of operationalisation of public health in a state of war or emergency in the EU is apparent from several EU acts within the framework of the EU Common Security and Defence Policy, which forms part of the EU Common Foreign and Security Policy. The Treaty on European Union and the Treaty on the Functioning of the European Union⁶ stipulates the elements supporting public health in the EU and EU member states in Title XIV, but only on a declaratory level without specifying measures or actions, even referring to the responsibility of the member states to provide for certain actions themselves. The Programme for the Union's action in the field of health ("EU4Health Programme") for the period 2021–2027 (Regulation (EU) 2021/522 of the European Parliament and of the Council of 24 March 2021) states the member states are primarily responsible for health policies, despite the experience of the COVID-19 pandemic, which called for a coordinated EU-wide response, but it does mention cross-border impacts and a stable financial architecture for public health action via the effective transfer of good practices between EU member states. Following the COVID-19 pandemic, the EU also established the Health Emergency Preparedness and Response (HERA) based on the Regulation (EU) of the European Parliament and of the Council on serious cross-border threats to health (Regulation (EU) 2022/2371 of the European Parliament and of the Council of 23 November 2022). The core purpose of this was to extend the legal framework for monitoring serious threats to health and the impact on public health in harmony with existing legislation, notably in the area of the exchange of personal data. Still, HERA will also remain operationally impotent so long as EU member states do not adopt national legislation with the objectives stated in the EU Regulation (Regulation (EU) 2022/2371 of the European Parliament and of the Council of 23 November 2022), thereby transferring certain national powers to the EU level.

Comparison of the operationalised Slovenian and EU normative acts showed a lack of powers on a high level, and many officially adopted acts that have not been implemented on the operational level. One may have expected the COVID-19 pandemic to have accelerated national and EU efforts to concretise public

⁶ Treaty on European Union and the Treaty on the Functioning of the European Union. Official Journal of the European Union, C201/1 of 7 June 2016.

health on the operational and tactical levels. However, the pandemic only accelerated the adoption of normative acts on the national and EU levels without appropriate concretisation concerning the actual functioning of the public health system in the case of ECs.

Results of Regulatory Studies

Despite the existence of the 2014 textbook *Katastrofna medicina*⁷ (Disaster Medicine), EU regulations, EU and NATO crisis management and leadership exercises, Slovenia failed during the pandemic, and something new is hence required. That is why the country carried out the *Resilience24* exercise and why public health must take a tangible, operational step forward, as not only confirmed by the COVID-19 pandemic and the exercise, but also by our day-to-day experience of the Ukrainian war and the armed conflicts in the Middle East.

Even though the new powers held by the Health Minister represent a big step forward, unless they are properly operationalised, they will not do much good. Above all, plans need to be understood; primarily, an answer is needed as to what we wish to achieve with the plan and, secondarily, the system only functions if the people will act on the plans and can internalise them. The proposed Operational and Tactical Plan (OTP) would entail an upgrade of, among others, the defence plan since it would be made more concrete by adding at least the time element, together with the actual number of people and material resources; two key pieces of information needed for the effective and efficient operationalisation of public health in a crisis situation, such as, for example, how many health workers from a given community health centre and how many material assets from a given warehouse are moved to another location. It will be necessary to move from generalities, which declare that something will have to be done, or what the priorities are, to concreteness and details. Also necessary is being specific about what is to be done, when, with whom and by whom. According to data for 2022 (Zaletel et al. 2022), in Slovenia this would collide with the direct interests of public institutions, i.e., 63 community health centres, and, in turn, the interests of the 212 Slovenian municipalities which are the co-founders of community health centres, 27 hospitals, 24 pharmacies and other public institutions, transfusion medicine, public health and social institutions.

The OTP would be an operationalisation of the defence plans since it would include, for instance, how many of Slovenia's 10,376 nurses or 7,122 medical doctors (Zaletel et al. 2022) would be deployed to other posts or locations, according to the emergency work system or work duty, and what their tasks there would be. These are not new questions; they were already raised in the Slovenian and EU context by the COVID-19 pandemic, but to date, as confirmed in the *Resilience24*

⁷ Načrtovanje in delovanje ob nenadnih dogodkih in tveganjih za zdravje ljudi ter kriznih razmerah na področju javnega zdravja – katastrofna medicina: seminar za specializante javnega zdravja. 2014. Ljubljana: Nacionalni inštitut za javno zdravje.

exercise, we are not yet able to answer them fully and satisfactorily. We therefore propose that the permanent member of the National Security Council or its secretariat should be the Minister of Health or at least a representative of the National Institute of Public Health (Nacionalni inštitut za javno zdravje, NIJZ), which would require an amendment to the National Security Council Decree. Representatives of the Ministry of Health or NIJZ would provide great added value to the National Security Council, as the health sector is presently taken for granted, precisely at a time when one is healthy. This is wrong, and in a state of war or emergency such thinking and perception of public health could prove fatal. The COVID-19 pandemic also demonstrated that international exercises, such as the North Atlantic Treaty Organization's (NATO's) CMX crisis management and leadership exercise and the European Union's CME exercise, which aim to test transnational crisis management procedures, have little or no use for national crisis management purposes, regardless of the fact that Slovenia has been actively participating in both exercises for many years. These exercises simply do not provide the appropriate added value on the national, NATO or EU levels.

Figure 3 is a matrix (part of the OTP) that presents the main tasks and challenges to help decide on an overall public health capacity development plan, which should be overseen by the Ministry of Health in the conditions of a state of war or emergency and crisis situations. To that end, the Ministry of Health should establish a single system through which all stakeholders can be informed. The average occupancy rate of hospital beds in Slovenia in 2021 was 60.7% (OECD/European Observatory on Health Systems and Policies 2023).

The presented matrix attempts to go beyond the statement that “disaster risk management capacity assessments, like in many EU Member States, are still a relative novelty in the Slovenian context” and that “there is no spare capacity of human resources” in the public health system (Cubano 2014, 26), as also shown by the Resilience24 exercise. We also want to move beyond the SARS-CoV-2 Infection Control and Containment Guidance (Navodilo za obvladovanje in zaježitev s SARS-CoV-2 okužbo) in terms of operationalisation, and at least partly achieve the objectives of increased EU resilience in public health contained in the EU Declaration (Deklaracija o usmeritvah za delovanje Republike Slovenije v institucijah Evropske unije v obdobju 2021–2024).

Figure 3: MATRIX TEMPLATE FOR ASSISTANCE WHILE DECIDING ON THE OPERATIONALISATION OF PUBLIC HEALTH IN ECS

No.	Public Health Degree	Percentage of hospitalised persons above the annual average	Percentage of hospitalised persons in intensive care units above the annual average	Number of excess deaths expressed as a percentage	Medical* staff units	Risks
1	Blue	Up to 29%	Up to 29%	Up to 5%	The usual	We are already working
2	Green	From 30% to 54%	From 30% to 54%	Up to 10%	The usual + 20%	After 3 months – difficulties in ensuring the implementation of regular activities
3	Yellow	From 55% to 65%	From 55% to 65%	Up to 15%	The usual + 30%	Postponement of certain public health activities after 3 months
4	Orange	From 66% to 80%	From 66% to 80%	Up to 20%	The usual + 40%	After 3 months, certain activities in the field of public health will be cancelled
5	Red A	From 81% to 100%	From 81% to 100%	Up to 40%	The usual + 80%	After 4 weeks, the possibilities of operating the entire public health system will be examined, and the possible suspension of education and training
6	Red B	From 101% to 120%	From 101% to 120%	Up to 60%	The usual + 100%	After 2 weeks, the suspension of all education and training in healthcare. The inclusion of 100% of work and material duty (Zobr) in support of public health. A change in the mission of public health

* Medical Staff units may be established based on the Rules on Emergency Medical Services, Staffing Standards and Norms in Nursing and Midwifery Care or another bylaw of the competent decision-maker.

Source: The author's own work.

DISCUSSION

With a matrix that would allow operationalisation and form part of the public health OTP for operation in a state of war or emergency, namely, in states of ECs, we propose a systemic change with which all public health stakeholders should be familiar. All public health stakeholders should also understand the OTP and, crucially, be able to operationalise it in a situation of actual crisis since, according to the Ministry of Health, Slovenia has not made any major systemic changes in the health sector since 1992 (Pregled stanja na področju zdravstva v Sloveniji – januar 2023). An OTP (including a matrix) would amount to a systemic change.

An adequate normative basis is vital for the functioning of public health in ECs, otherwise the decisions (decrees, decisions etc.) of the decision-makers or the executive power will be annulled or even overturned by the courts (Slovenian Constitutional Court Decision No. U-I-79/20 of 13 May 2021; Bajt 2021, 55; Novak 2022; Šugman Stubbs 2024; Źóltak and Jędryś 2023, 120).

EU countries have at least two options for the normative operationalisation of public health in ECs. These options are, first, to directly implement EU rules in national legislation and, second, to implement strict national legislation which does not conflict with rules of the EU (Geer and Jarman 2020; Hervey 2004).

One consequence of the COVID-19 pandemic in the Slovenian legislative sphere is the National Assembly's adoption of provisions in ZIUZDS that give the Minister of Health powers to order temporary measures that no Slovenian Minister of Health has held before. The ZIUZDS provisions relating to the new powers of the Minister of Health have only been in force since 2023, with some even more recently (in 2024), which reveals the nascent stage of development of the operationalisation of Slovenian public health to act in ECs.

CMX or CME exercises are not sufficiently based on real-life situations. It will be necessary to determine how medical and public health staff will actually function in a state of war or emergency, which can only be done by conducting a national crisis management and leadership exercise in which the Minister of Health redeploys public health workers and material resources from one end of Slovenia to the other, or even to support allies. An initial problem will surely be whether the management and decision-makers in community health centres will agree to the withdrawal or redeployment of their staff and material resources to other locations, perhaps for a longer period of time.

CONCLUSION AND FURTHER DIRECTIONS OF ACTIVITIES

Irrespective of the lessons learned from the COVID-19 pandemic, the preparedness of Slovenia and the EU is still not at a level that would allow for a sufficiently effective, efficient, predictable and operational public health response in ECs. The proposed matrix, as part of a Public Health Operational Tactical Plan (OTP), could be a model for the operational and tactical functioning of public health in such circumstances. The matrix could perhaps encourage

decision-makers and actors in the public health system to take such public health action in ECs that would in fact be predictable and tangible.

In emergency situations, the National Security Council makes operational decisions concerning the implementation of all national measures, also regarding public health. At the time of the COVID-19 pandemic, neither the Minister of Health nor the Director General of NIJZ were permanent members of the National Security Council or its Secretariat. Today, we encounter a similar situation as the Minister for Health or the Director-General of NIJZ continue not to be permanent members of those bodies, despite the fact the area of health has been designated as part of critical infrastructure. Although ZIUZDS gives the Minister of Health considerable power to make decisions during ECs, it is illusory to expect the Minister of Health to be able to make key decisions independently of other state stakeholders, which would require a state of war or emergency.

With this study, we propose the creation of a Public Health OTP and to complement the composition of the National Security Council National Security Council or its Secretariat with the Minister of Health or the Director General of the NIJZ because we believe that only these two measures would be able to operationalise public health in ECs, at least initially.

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ZAGOTAVLJANJE JAVNEGA ZDRAVJA V VOJNIH IN IZREDNIH RAZMERAH ZA VEČJO DRUŽBENO ODPORNOST

Operacionalizacija javnega zdravja v vojnem in izrednem stanju

Povzetek. *Državna in družbena odpornost je trenutno najbolj aktualna tema v sedanjem političnem in posledično obrambno- ter vojaškostrateškem odločanju. Povečanje oborožitvenih zmogljivosti držav je posledica večanja državne in družbene odpornosti. V vsesplošni histeriji povečanja zgolj vojaške ognjene moči se ni mogoče izogniti občutku, da je mnogokatero področje družbene odpornosti (kot ključne državne infrastrukture) prezrto. Eno takšnih splošno prezrtih delov kritične infrastrukture je tudi področje javnega zdravja. V tem članku bomo splošno orisali EU in predvsem slovenski sistem javnega zdravja ter predlagali operativno-taktični načrt delovanja javnega zdravja v izrednih in vojnih razmerah.*

Ključni pojmi: *javno zdravje, katastrofna medicina, vojno stanje, izredno stanje, izredne okoliščine.*

Hajdana GLOMAZIĆ, Dejan ŽIVANOVIĆ, Katarina GLOMAZIĆ*

DEPERSONALISATION IN WOMEN PROVIDING PSYCHOSOCIAL SUPPORT SERVICES**

Abstract. *The article examines the relationship between depersonalisation and the provision of psychosocial support among women in helping professions. The aim of the study was to determine the extent to which depersonalisation, as a consequence of occupational burnout, is present in women working in these professions, and to identify the factors that predict it. The research was a quantitative empirical cross-sectional study that applied a descriptive/analytical approach. The sample included 302 women from the Western Balkans. The findings show that approximately one-third of the participants exhibited mild symptoms of this phenomenon, whereas 12.5% had moderate to high levels. It was revealed that marital status, holding a professional licence, intercultural training, and international/intercultural experience are predictors of depersonalisation levels.*

Keywords: *burnout, depersonalisation, helping professions, secondary traumatisation, vulnerable groups, gender.*

INTRODUCTION

Burnout is defined as a psychological syndrome characterised by three key dimensions: emotional exhaustion, depersonalisation, and a reduced sense of personal accomplishment (Maslach and Jackson 1981; Maslach and Leiter 2016). The phenomenon was initially identified among professionals working in human-service fields, such as healthcare, social work, and education. However, research has shown that burnout can occur across a wide range of occupations (de Hert 2020). The burnout concept further developed by Maslach and colleagues laid the foundation for numerous subsequent studies and assessments of the syndrome, including the *Maslach Burnout Inventory* (MBI).

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As a central dimension of burnout, depersonalisation refers to the development of a negative, cynical, and emotionally detached attitude to the recipients of services (Maslach et al. 2001). Functionally, it is a mechanism of emotional self-defence via which professionals attempt to preserve personal stability when faced with the excessive demands of others (Maslach et al. 2001; Kristensen et al. 2005). In this context, depersonalisation may manifest as a decline in empathy, a sense of alienation, and emotional emptiness in interactions with clients, as well as through the instrumentalisation of relationships, whereby clients are no longer perceived as individuals with unique needs (Bakker et al. 2003). Empirical evidence further indicates that high emotional labour demands, including those in service professions, are linked to emotional burnout (Šadl and Osolnik 2023), thereby reinforcing the fact that depersonalisation is a key dimension of burnout.

In the empirical literature, depersonalisation has been associated with a range of negative outcomes, such as reduced quality of professional services, increased conflicts during client interactions, higher rates of absenteeism, and a strong intention to leave the profession (Leiter and Maslach 2009; Taris et al. 2005). Such consequences are particularly detrimental in helping professions where a high degree of emotional engagement, availability, and empathic responsibility is expected.

In this study, depersonalisation was examined as a distinct dimension of burnout through use of the MBI (Maslach et al. 1996). The investigation focused on women employed in professions that provide psychosocial support, including counselling, psychotherapy, social work, cultural mediation, healthcare, humanitarian work, and fieldwork, with the aim of gaining a deeper understanding of this form of emotional distancing.

REVIEW OF LITERATURE

Psychosocial Support

Psychosocial support is a form of professional assistance provided to traumatised and vulnerable groups, and a specific risk factor in occupational burnout.

Psychosocial support encompasses a range of activities that enhance the psychological wellbeing of individuals and communities in crises, and entails professional engagement sensitive to the local context (IASC 2007). Support of this type involves assisting others through guidance, protection, care, and the improvement of health for individuals who have experienced adverse life circumstances (Chart et al. 2014; Kopřiva 1997; Musil 2004, as cited in Čopkova 2022). It refers to various forms of emotional, social and psychological assistance provided to individuals faced with stress, trauma, poverty, social exclusion, and other unfavourable life conditions. The World Health Organization (WHO 2013) emphasises the importance of integrated psychosocial support, notably in work with vulnerable groups exposed to traumatic experiences. The professionals providing these services are typically engaged in specific helping professions, and encompass healthcare workers, psychologists, psychiatrists, psychotherapists,

social workers, cultural mediators, and others. Their role involves delivering psychological first aid, assessing the acute needs of clients, listening to their concerns, and connecting them with relevant services capable of providing appropriate support (Đurović and Biro 2019).

Psychosocial support is given to different populations, including children, elderly, refugees, asylum seekers, victims of human trafficking, and other vulnerable groups. In this context, professionals are continuously exposed to emotionally demanding situations. Authors accordingly describe how general practitioners, psychiatrists, psychotherapists, counsellors, and social workers are especially at risk of experiencing the negative effects of such work, including the development of depersonalisation (Vićentić et al. 2010).

Depersonalisation as a Result of Providing Psychosocial Support in Helping Professions

Research data suggest that burnout syndrome at work is particularly prevalent among professionals in helping professions, with those engaged in the protection and promotion of mental health facing especially high risk (Vićentić et al. 2010). The authors refer to professionals working with traumatised and multiple vulnerable populations, such as victims of violence, torture, forced displacement, and migrant groups. They believe that prolonged exposure to others' suffering in the mentioned contexts, coupled with a lack of systemic support, significantly adds to the risk of developing depersonalisation (Vićentić et al. 2010). Further, they note that professional engagement in this field involves continuous and emotionally intense work with clients, which "requires a special interpersonal dimension" (Vićentić et al. 2010, 742) in daily practice. It is also shown that, in the course of working with individuals who have experienced trauma, professionals may develop symptoms which are not a result of direct personal experiences, but stem from prolonged exposure to the trauma narratives of others (Figley 1999).

Depersonalisation as a psychological phenomenon refers to a state in which an individual experiences a sense of detachment from their own thoughts, body and emotions, which can be profoundly disorienting and disruptive to daily functioning (Maslach et al. 2001). In this way, it can manifest as a defence mechanism against overwhelming emotions and empathic overload, and be defined as an identity disturbance characterised by the subjective experience of being detached or estranged from oneself (APA 2013). Authors explain that depersonalisation is associated with both occupational burnout and secondary traumatisation (Kanios et al. 2021). They add that in the context of burnout, depersonalisation is characteristic of various professions, including helping professions, whereas with secondary traumatic stress (STS) it largely occurs among professionals who are indirectly exposed to traumatic experiences (ibid.). Common health consequences of secondary traumatisation include symptoms of depersonalisation, PTSD, anxiety, depression, burnout, fatigue, and related conditions (Greinacher et al. 2019).

Research in this area indicates that continuous exposure to the trauma and suffering of others – common in fields like child protection (Endsjø et al. 2024), work with victims of violence, war veterans, or chronically ill patients – can lead to secondary traumatic stress (STS) among service providers, which might raise the likelihood of burnout (Endsjø et al. 2024). Persistent empathic engagement and confrontation with the extreme emotional demands of the job gradually deplete the capacity for compassion, causing professionals (often unintentionally) to resort to depersonalisation as a defence mechanism to continue functioning. This is supported by findings that people who frequently work with abused children or traumatised populations exhibit higher levels of burnout symptoms, including emotional detachment from clients, than those free of occupational burdens (Endsjø et al. 2024).

Despite individual differences, burnout – and particularly depersonalisation – is the result of a cumulative process. It encompasses not simply the intensity of the workload but also the lack of support, weak systems for evaluating work, and insufficient recognition of the emotional effort invested (Maslach et al. 2001; Schaufeli et al. 2009). Bride et al. (2004) and Figley (2002) emphasise that the timely identification of depersonalisation symptoms in helping professions is crucial, not only for safeguarding the mental health of professionals themselves but for ensuring the quality of services provided to highly vulnerable clients as well.

In international practice concerned with professional protection and employee wellbeing within helping professions, structured forms of support are implemented on multiple levels – beginning with the individual (self-regulation, resilience), extending to teams (supervision, mentoring support), and encompassing the organisation (workload distribution, rotation, work protocols) (SAMHSA 2014). These mechanisms, along with organisational policies that define mandatory supervision intervals and assure access to crisis support, help lower the risk of burnout and depersonalisation.

Researchers suggest that organisations could indirectly influence employees' levels of emotional exhaustion by adapting existing procedures and selection processes, along with investing in training and coping programmes (Šadl and Osolnik 2023). However, a review of psychological, sociological and management literature examining the role of protective factors and coping strategies in maintaining health and wellbeing reveals that most studies primarily focused on individual resources (Urdih Lazar et al. 2019).

Depersonalisation and Gender

Studies highlight the importance of considering gender differences while discussing the mechanisms of how depersonalisation is manifested (Marković et al. 2024; Özbay and Bülbül 2024). Authors note the existence of differences regarding how men and women cope with stress and trauma: men are more likely to employ problem-focused strategies; women tend to seek emotional support (Fu

and Wang 2023; Jay et al. 2019; Olf 2017). Olf (2017) argues that social support is especially valuable for women, and that its absence is one of the most common predictors of negative trauma outcomes. On top of gender, other sociodemographic variables have been shown to be associated with burnout, including age, education, marital status, and work experience (Glomazić and Vidović 2024; Marković et al. 2024). Nevertheless, as the authors point out, further research is needed to clarify the nature of these correlations.

These differences may influence how mental health professionals experience and assess their own capacities for coping with traumatic experiences, with gender potentially playing a significant role in shaping psychological resilience (Özbay and Bülbül 2024). Available data indicate that women, on average, report emotional symptoms like anxiety, depression, and feelings of helplessness more frequently than men (Kindermann et al. 2017; Olf 2017; Baum et al. 2014). Higher levels of empathy, which are more often observed in women, may lead to deeper emotional engagement while working with trauma survivors, thereby making them more vulnerable. A meta-analysis of 12 studies showed a significant gender difference in susceptibility, with women exhibiting higher levels of secondary traumatisation symptoms compared to men (Baum et al. 2014). Other authors have reported that their research showed men displayed significantly higher levels of depersonalisation than women (Greenglass et al. 1990). They explain these findings by noting that even though men experienced greater work-related stress than women, unlike women, they did not employ common coping strategies.

Baum and colleagues (2014) stated that gender differences are also evident in coping with stress and traumatic content. Women more often seek social support and express emotions openly, using coping strategies and investing in friendships and cultural activities, whereas men tend to apply strategies characterised by emotional withdrawal or attempt to solve problems by themselves without recourse to others (Olf 2017; Greenglass et al. 1990). According to some analyses, women are especially vulnerable to secondary traumatisation in environments where social support is limited and there is a high level of emotional avoidance (Baum et al. 2014).

In the context of professional practice, women employed in fields such as social work, psychotherapy and healthcare are often more susceptible to burnout and depersonalisation due to the combination of intensive emotional engagement and cultural norms that reinforce caregiving roles. In comparison, men working in the same sectors may experience pressure to conceal signs of emotional vulnerability, which may hinder the timely recognition and treatment of symptoms (Glomazić and Vidović 2024). Cross-cultural comparisons also reveal differences; for instance, in the United States, gender disparities in secondary traumatisation are less pronounced than in some other countries, revealing the significance of cultural and professional factors in shaping both the experience and expression of these symptoms (Baum et al. 2014).

Understanding gender differences in the manifestation and mechanisms of depersonalisation is essential for gaining deeper insights and developing tailored preventive and intervention strategies.

METHOD

The study was conducted as a quantitative cross-sectional empirical analysis, employing a descriptive/analytical approach. The article examines the relationship between depersonalisation and the provision of psychosocial support among women in helping professions. The aim of the research was to assess the extent to which depersonalisation, as an outcome of occupational burnout, is present in the female population within helping professions, as well as to identify the factors that predict it.

The general hypothesis guiding the research is that depersonalisation, as a dimension of occupational burnout, is present among women providing psychosocial support, and its intensity depends on sociodemographic and professional characteristics.

Based on the theoretical framework and previous findings, the following specific hypotheses were formulated:

- **H1:** Depersonalisation is present among women providing psychosocial support, with a portion of the sample expected to exhibit moderate to high symptoms.
- **H2:** The level of depersonalisation varies according to sociodemographic characteristics.
- **H3:** Professional characteristics, including additional training and holding professional licences, help predict the level of depersonalisation.

The study was conducted on a sample of 302 women providing psychosocial support across various institutions in the Western Balkans. For the purposes of the research, the standardised MBI was used, together with an online questionnaire used to collect demographic and professional data.

The collection of primary data was conducted from April to June 2024 in six Western Balkan countries. The sample consists of female professionals employed in non-governmental organisations (NGOs) – including centres, shelters, and safe houses – as well as reception and transit centres operating in the field of mixed migration, and specialised services like counselling centres. Invitations to participate in the survey were distributed through official institutional and association mailing lists, as well as internal communication channels. Inclusion criteria required participants to be women over the age of 23, employed in the provision of psychosocial support, with a minimum 6 months of professional experience. It was assumed that providers of psychosocial services possess specific qualifications for their roles. The sample was therefore intentionally limited to highly educated respondents; namely, those holding at least a university degree or equivalent qualification necessary to work in this field. The focus on

women was guided by two considerations: the predominance of women in helping professions and the intention to precisely examine the risk profile and predictors of depersonalisation within the population statistically most represented in these roles. While this focus does not imply the exclusion of men, it represents a targeted phase of research that could be expanded subsequently through comparative studies.

Statistical Analysis

IBM SPSS Statistics, version 25, was used for the statistical processing of the data. The analysis began with a descriptive overview in which frequencies and percentages were calculated for sociodemographic variables. To examine the latent structure of the Depersonalisation scale, exploratory factor analysis (EFA) was conducted, while the scale's internal consistency was verified using Cronbach's alpha coefficient as a standard indicator of reliability.

For numerical variables, the range, mean with the corresponding standard deviation, median, and interquartile range were reported, while categorical variables were presented using frequencies and percentages.

Finally, to examine the relationship between general sociodemographic characteristics and professional experience variables with scores on the Depersonalisation scale, multivariate linear regression analysis was conducted, allowing for the simultaneous assessment of the effects of multiple predictors.

RESULTS

Table 1 presents the basic demographic characteristics of the sample, which included a total of 302 participants. The respondents' mean age was 41.10 years (SD = 10.05), ranging from 23 to 67 years. The most represented age group was 34 to 43 years (40.1%), while the fewest participants were in the oldest category, 54 to 67 years (12.3%).

The sample included participants from six countries in the region. The largest number of respondents were from Serbia (26.5%), followed by Bosnia and Herzegovina (18.9%) and Montenegro (15.2%). The remaining countries were more evenly represented: Albania (13.9%), North Macedonia (13.2%) and Kosovo (12.3%).

Regarding marital status, the majority of participants were married (56.6%), with those who were single comprising just over one-quarter of the sample (26.3%). Divorced participants accounted for 13.1%, and widows for 4%.

Concerning educational background, all participants had attained at least a university degree. Most had completed undergraduate studies (67.2%), while 32.8% held a postgraduate degree or doctorate.

Table 1: GENERAL INFORMATION ABOUT THE PARTICIPANTS

N = 302	
Age (years), Mean (Std. Deviation), Min – Max	41.10 (10.05), 23.0 – 67.0
Age categories:	
23 – 33	69 (22.8%)
34 – 43	121 (40.1%)
44 – 53	75 (24.8%)
54 – 67	37 (12.3%)
Country:	
Serbia	80 (26.5%)
Bosnia and Herzegovina	57 (18.9%)
Montenegro	46 (15.2%)
North Macedonia	40 (13.2%)
Kosovo	37 (12.3%)
Albania	42 (13.9%)
Marital status:	
Single	78 (26.3%)
Married	168 (56.6%)
Divorced	39 (13.1%)
Widow	12 (4%)
Education level:	
Secondary education	0 (0.0%)
Higher education (Bachelor's degree)	203 (67.2%)
Postgraduate studies/Doctorate	99 (32.8%)

Source: Autor's primary survey data.

Table 2 provides an overview of the participants' professional characteristics with regard to their training, licences, type of engagement, and populations of clients they work with.

As concerns therapeutic training, 36.4% of the participants reported having attended related programmes, yet 63.6% had not received such education. A similar distribution was observed for specialised training related to working with trauma – 49.0% of the participants had received this type of training, whereas 51.0% had not.

Over half the participants (55.6%) held a professional licence to provide services, although 44.4% do not. Some form of intercultural training was reported by 59.6% of the participants, whereas 40.4% had not received such preparation. Regarding international and intercultural experience, 52.6% of the participants indicated holding such experience, while 47.4% did not.

Table 2: PROFESSIONAL WORK EXPERIENCE IN SERVICE PROVISION

	n (%)
Therapeutic training:	
Yes	110 (36.4%)
No	192 (63.6%)
Trauma-specific training:	
Yes	148 (49.0%)
No	154 (51.0%)
Professional service provider licenses:	
Yes	168 (55.6%)
No	134 (44.4%)
Some form of intercultural training:	
Yes	177 (59.6%)
No	120 (40.4%)
General international/intercultural experience:	
Yes	159 (52.6%)
No	143 (47.4%)
Type of work:	
Counseling	173 (57.3%)
Psychotherapy	37 (12.3%)
Social work	155 (51.3%)
Cultural mediation	40 (13.2%)
Humanitarian work	110 (36.4%)
Healthcare	37 (12.3%)
Field work	77 (25.5%)
Type of service recipient:	
Asylum seekers	100 (33.1%)
Migrants	120 (39.7%)
Victims of violence	239 (79.1%)
Victims of human trafficking	55 (18.2%)

Source: Autor's primary survey data.

With respect to the type of work performed, counselling (57.3%) and social work (51.3%) were the activities most frequently reported. A substantial proportion of participants was also engaged in humanitarian work (36.4%) and field activities (25.5%), whereas psychotherapy (12.3%), healthcare provision (12.3%) and cultural mediation (13.2%) were less represented, albeit remained relevant.

Regarding the service recipients, the majority of participants were working with victims of violence (79.1%), followed by migrants (39.7%) and asylum seekers (33.1%), while 18.2% reported working with victims of human trafficking.

Table 3: DESCRIPTIVE STATISTICS AND SUMMARY OF THE RESULTS FROM THE EFA ON THE DEPERSONALIZATION

Items and Total Scores	Min–Max	Me	IQR	M	SD	α	Factor loadings (57,9%)#
Depersonalization Item 1	0 – 6	0.00	1.00	0.75	1.53	0.763	0.810
Depersonalization Item 2	0 – 6	0.00	2.00	1.24	1.83	0.760	0.733
Depersonalization Item 3	0 – 6	0.00	2.00	1.40	1.98	0.742	0.817
Depersonalization Item 4	0 – 6	0.00	1.00	0.84	1.71	0.770	0.698
Depersonalization Item 5	0 – 6	1.00	2.00	1.14	1.59	0.770	0.738
Depersonalization Total Score	0 – 30	4.00	6.00	5.40	6.60	0.815	

Note. **p < .01; Me = Median; IQR = Inter-quartile range; M = Mean; SD = Std. Deviation; α = Cronbach's alpha.

Depersonalization Item 1 = *I get the feeling that I treat some clients/colleagues impersonally, as if they were objects*; Depersonalization Item 2 = *I have become more callous to people since I have started doing this job*; Depersonalization Item 3 = *I'm afraid that my work makes me emotionally harder*; Depersonalization Item 4 = *I'm not really interested in what is going on with many of my colleagues*; Depersonalization Item 5 = *I have the feeling that my colleagues blame me for some of their problems*.

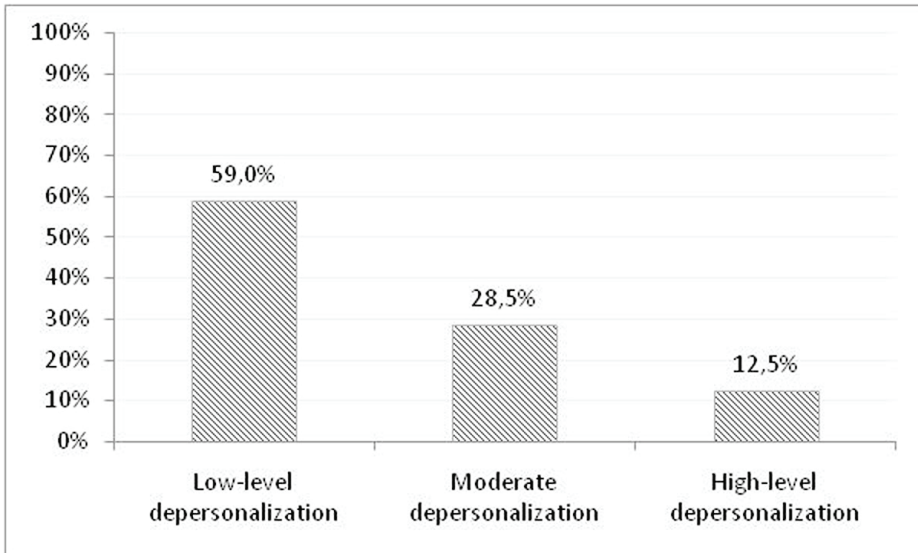
#Percentage of the variance accounted the factor; EFA= Exploratory factor analysis (Varimax rotation).

Source: Autor's primary survey data.

Table 3 presents descriptive statistics for all measured variables, along with Cronbach's alpha values and factor structure. The results of the exploratory factor analysis (EFA) show depersonalisation is a unidimensional construct. Bartlett's test of sphericity was significant ($\chi^2 = 578.08$, $df = 10$, $p < 0.001$) and the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy was satisfactory (0.721). The reliability of the depersonalisation scale is good, as indicated by the high Cronbach alpha coefficient ($\alpha = 0.815$). It is important to note that the removal of any of the five items would not further increase the alpha value.

The mean total score for depersonalisation was 5.40 (SD = 6.60). When examined by category, 59.0% of participants exhibited a low level of depersonalisation, 28.5% a moderate level, while 12.5% of women providing psychosocial support services a high level of depersonalisation (Graph 1).

Graph 1: DEPERSONALIZATION CATEGORY



Source: Autor's primary survey data.

Table 4 presents the results of the linear regression models with the total depersonalisation score as the dependent variable. The basic model accounts for 16.3% of the variance in depersonalisation, with marital status categories emerging as statistically significant predictors. Single women ($\beta = 0.27$; 95% CI: 0.24–7.81; $p < 0.05$) and divorced women ($\beta = 0.57$; 95% CI: 7.45–14.85; $p < 0.01$) exhibited higher depersonalisation scores compared to the reference group.

In the full model, which explained 60.7% of the variance in depersonalisation, marital status remained a significant predictor: single women ($\beta = 0.49$; 95% CI: 4.30–10.41; $p < 0.01$) and divorced women ($\beta = 0.52$; 95% CI: 7.17–13.05; $p < 0.01$) exhibited higher levels of depersonalisation. In addition, participants holding a professional licence to provide services ($\beta = 0.42$; 95% CI: 4.29–6.81; $p < 0.01$) and those possessing international or intercultural experience ($\beta = 0.26$; 95% CI: 2.13–4.91; $p < 0.01$) also demonstrated higher levels of depersonalisation.

On the other hand, participation in some form of intercultural training emerged as a protective factor since it significantly reduces depersonalisation levels ($\beta = -0.35$; 95% CI: -6.22 - -3.35; $p < 0.01$).

Table 4: LINEAR REGRESSION MODELS OF THE ASSOCIATION BETWEEN GENERAL INFORMATION, PROFESSIONAL EXPERIENCE, AND DEPERSONALIZATION

	Basic model (Beta CI 95%) Adj. R ² = 16.3	Full model (Beta CI 95%) Adj. R ² = 60.7
Age	0.03 (-0.65 – 0.10)	-0.06 (-0.20 – 0.10)
Marital status (ref.: widowed)		
Married	0.23 (-0.26 – 6.39)	0.41 (2.87 – 8.05)
Single	0.27 (0.24 – 7.81)*	0.49 (4.30 – 10.41)**
Divorced	0.57 (7.45 – 14.85) **	0.52 (7.17 – 13.05)**
Education (ref.: higher education)		
Postgraduate studies/Doctorate	0.02 (-1.17 – 1.80)	0.08 (-0.02 – 2.35)
Therapeutic training (ref.: no)		
Yes		-0.023 (-1.66 – 1.22)
Trauma-specific training (ref.: no)		
Yes		0.05 (-0.73 – 2.17)
Professional service provider licenses (ref.: no)		
Yes		0.42 (4.29 – 6.81)**
Some form of intercultural training (ref.: no)		
Yes		-0.35 (-6.22 – -3.35)**
General international/intercultural experience (ref.: no)		
Yes		0.26 (2.13 – 4.91)**

* $p < 0.05$; ** $p < 0.01$.

Source: Autor's primary survey data.

DISCUSSION

The study results indicate a relatively low average level of depersonalisation among women providing psychosocial support, with the majority of participants falling into the mild symptom category. This finding does not fully align with our first hypothesis. However, it is important to note that nearly one-third of the participants exhibited moderate levels of depersonalisation, while 12.5% experienced it with a high intensity. Although quantitatively smaller, this subgroup requires particular attention as symptoms of secondary traumatisation and depersonalisation can substantially undermine the quality of professional interactions and self-assessed efficacy in working with traumatised individuals (Vićentić et al. 2010; Glomazić et al. 2025).

Our second hypothesis (H2), which states that depersonalisation varies depending on sociodemographic characteristics, was partially confirmed – marital status emerged as a significant predictor, with higher levels of depersonalisation observed among unmarried and divorced participants. Similarly, the third hypothesis (H3) may also be considered partly confirmed because the findings show that professional characteristics – including additional training and holding professional licences – contribute to predicting the level of depersonalisation.

Low median values for individual scale items suggest that most participants did not experience a significant development of detachment or emotional distancing, which may be associated with the presence of certain protective factors like holding professional licences, training, and intercultural experience. Nonetheless, the fact that nearly half the sample had not received specific training on trauma (51.0%) and that 44.4% of participants did not hold a professional licence could indicate potentially weaker foundations for preventing secondary traumatisation which in the long term might manifest as symptoms of depersonalisation. Findings of the regression analysis further explain this paradox: while a professional licence and international experience are associated with higher depersonalisation scores (probably due to more intensive exposure to demanding professional situations), certain types of intercultural training emerged as protective factors (Kindermann et al. 2017). This suggests that the content and structure of the training play a crucial role in mitigating risk, rather than their mere formal presence.

When considering local specificities, it is important to note that the conditions in the Western Balkans – including the post-conflict legacy, transient migration routes, and chronic resource constraints, coupled with project-based funding mechanisms – heighten professionals' exposure to complex cases and sustained pressures. The inconsistent quality and duration of intercultural and trauma-focused training help explain why the mere presence of such programmes is insufficient.

A key finding pertains to the professional context – women engaged in counselling, social work, field activities, and work with victims of violence and migration are subjected to multiple emotional demands. The data indicate that 79.1% of the participants were working with victims of violence, and nearly 40% with migrants and asylum seekers. These client groups are inherently highly trauma-exposed, thereby subjecting helping professionals to repeated secondary traumatisation (Glomazić and Mikić 2022; Kindermann et al. 2017). Even though most women in the sample demonstrated resilience, the presence of moderate and high scores on the depersonalisation scale indicates that professional exposure is not without consequences, notably in the context of prolonged emotional engagement. In this regard, the findings further suggest that individual circumstances (such as marital status) may serve as a significant predictor: single and divorced participants reported higher levels of depersonalisation, which may reflect a combination of reduced social support and increased vulnerability to occupational stress.

An important contribution of this study lies in the analysis of the gendered dimensions of depersonalisation. Some findings in the literature suggest that women, due to higher levels of empathy and culturally conditioned expectations related to caregiving, may exhibit greater sensitivity to secondary traumatisation (Baum et al. 2014), a conclusion that should be interpreted with caution. Yet, when the issue is examined within a broader context, depersonalisation among women cannot be viewed solely as an individual reaction, but as a reflection of institutional and societal factors that shape their professional roles (Glomazić and Vidović 2024). Cultural norms which position women as ‘natural caregivers’ simultaneously make them more emotionally vulnerable and burden them with a heightened sense of responsibility, thereby adding to the risk of emotional distancing as a form of self-protection.

Interestingly, despite the presence of protective factors such as international experience and intercultural training (present with about half the participants), symptoms of depersonalisation were not fully eliminated. This may point to the complexity of the phenomenon, and the fact that structural resources such as training are not always sufficient unless accompanied by continuous psychological support and supervision. In this respect, our findings suggest that education is an important, yet insufficient, condition for resilience.

Moreover, while the study did not examine the direct relationship between personality traits and depersonalisation, previous research suggests that characteristics such as neuroticism may increase vulnerability to emotional exhaustion, while extraversion appears to serve as a potential protective factor (Bakhshi et al. 2021). Future research could focus on combining data on personality traits with professional resources in order to more precisely define risk profiles within helping professions.

The results of the research ultimately highlight the need for systemic attention directed to women in helping professions who work with highly traumatised populations. While most of them demonstrated signs of resilience, there are clear indicators of risk for emotional distancing and diminished connectedness with service users. Professional support should thus not rely solely on training and technical expertise, but also on creating spaces for emotional reflection, supervision, and the recognition of vulnerability as a legitimate aspect of professional practice.

CONCLUSION

The research results confirm that depersonalisation among women providing psychosocial support, although on average of low intensity, constitutes a genuine professional risk calling for systemic attention. Unmarried and divorced women appear particularly vulnerable as they have higher scores on the depersonalisation scale, which shows the importance of personal and social context in shaping professional experience. Further, the presence of a professional licence and international experience, while associated with higher levels of depersonalisation,

likely reflects greater exposure to more complex and demanding professional situations. At the same time, intercultural training emerged as a protective factor, stressing the need for systemic investment in educational programmes that equip professionals to work effectively in multicultural and trauma-affected contexts.

In a broader sense, the study findings suggest the prevention of depersonalisation cannot rely solely on individual resilience or occasional training, and instead requires an integrated approach that combines professional resources, continuous psychological support, and institutional mechanisms of protection. Such a framework would not only ensure the protection of practitioners' mental health, but additionally maintain the quality and ethical standards of services delivered to the most vulnerable social groups.

The study has several limitations related to its cross-sectional design and reliance on self-reported data, which do not allow for causal inferences. The sample is also non-representative and was formed using the snowball sampling method, with no male comparison group included. Empathy and culturally mediated gender expectations were also not directly measured.

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DEPERSONALIZACIJA MED IZVAJALKAMI PSIHOSOCIALNE PODPORE

Povzetek. Ta članek raziskuje povezanost med depersonalizacijo in psihosocialno podporo pri ženskah v poklicih pomoči. Namen raziskave je bil ugotoviti, v kolikšni meri je depersonalizacija kot posledica izgorevanja na delu navzoča v ženski populaciji v poklicih pomoči, ter prepoznati njene prediktivne dejavnike. Raziskava je bila izvedena kot kvantitativna empirična presečna študija z deskriptivno-analitičnim pristopom. V vzorec sta bili vključeni 302 ženski na območju Zahodnega Balkana. Ugotovitve raziskave kažejo, da približno tretjina udeleženk kaže blage simptome, medtem ko je pri 12,5% žensk zabeležena zmerna do visoka izraženost tega pojava. Rezultati so pokazali, da so zakonski stan, strokovne licence, interkulturno usposabljanje ter mednarodne/interkulturene izkušnje pomembni prediktorji ravni depersonalizacije.

Ključni pojmi: izgorelost, depersonalizacija, poklici pomoči, sekundarna traumatizacija, ranljive skupine, spol.

Jasna MIKIĆ LJUBI*

SEKSIZEM V POIMENOVANJIH POKLICEV? ANALIZA POKLICNIH NAZIVOV V SLOVENSkih ČASOPISIH IN REVIJAH (1958–2018)**

Povzetek. Namen članka je analizirati slovnične oblike, v katerih so se pojavljala poimenovanja poklicev, ter s pomočjo feministične stilistike na ravni poklicnih poimenovanj odkriti vidike seksizma v jeziku. Analiza zajema štiri časovne točke (1958, 1978, 1998 in 2018) in se osredotoča na tri časopise/revije (*Delo*, *Gospodarski vestnik* in *Naša žena*). Ugotovitve kažejo, da je bil jezik v veliki meri podvržen seksizmu, kar se kaže predvsem v prevladujoči rabi moške slovnične oblike kot generične in v spolno specifični rabi jezika pri naslavljanju poklicev. Omenjeni praksi sta odraz uveljavljene jezikovne norme, pa tudi spolnih stereotipov.

Ključni pojmi: jezik, spol, seksizem, seksistični jezik, poklici, poklicna poimenovanja.

UVOD

Jezik ima pomembno sporazumevalno vlogo, je orodje, ki nam omogoča komuniciranje in nas povezuje z drugimi. Hkrati pa je neločljivo povezan z družbo in vpet v izvajanje moči v njej. Če upoštevamo, da so odnosi komuniciranja tudi odnosi simbolne moči med govorcami in govorkami (Bourdieu 1991, 37), lahko jezik (kot obliko družbene prakse) razumemo kot orodje za ustvarjanje in vzdrževanje neenakosti v družbi. V članku obravnavamo razmerje med jezikom in neenakostmi med spoli ter pri tem govorimo o prisotnosti seksizma v jeziku oz. o seksističnem jeziku.

Čeprav je seksizem v jeziku mnogokrat zelo jasno prepoznaven, se vse pogosteje nahaja tudi v bolj subtilnih in nevidnih oblikah, ki temeljijo na starih idejah in koreninah seksizma (Mills 2008, 44, 134). Slovarji in slovnice kot ključna

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mesta kodifikacije (in) standardnega jezika so zagotovo eno od manj vidnih (in preizpraševanih) področij, v katerem se spolne delitve nenehno potrjujejo in ohranjajo (Leskošek 2000; Gorjanc 2005; Gorjanc 2007; Humar 2011; Kern 2015; Gorjanc 2017). Moško generično obliko, ki se po obstoječih slovnicih pravilih v številnih jezikih po svetu uporablja kot enotna oblika za splošno naslavljanje, pa tudi za naslavljanje žensk in moških skupaj (Horvath in Sczesny 2016, 317), feministični jezikoslovke in jezikoslovci, pa tudi številne mednarodne ustanove (npr. EU, Svet Evrope, UNESCO, OZN), označujejo kot seksistično prakso. Na tej osnovi so oblikovale dokumente v obliki smernic oz. priporočil za bolj spolno občutljivo/vključujočo rabo jezika. V slovenskem jeziku, v katerem ženska poimenovanja z vidika besedotvorja niso omejena in je za vsako moško poimenovanje mogoča tvorba ženskega para (Toporišič 2000; Toporišič et al. 2001; Umek 2008; Markežič 2018), so tovrstna naslavljanja z moško obliko še toliko bolj problematična in očitna.

Različne vidike jezikovnega seksizma bomo v članku obravnavali na primeru slovenskega jezika, in sicer na področju poklicev. Dosedanje (tuje in domače) raziskave jezika v poklicih, ki so se primarno posvečale zaposlitvenim oglasom, kažejo na prevladujočo vlogo moških oblik v zapisovanju poklicev (Mucchi-Faina 2005; Hodel et al. 2017; Kozmik in Jeram 1995; Salecl 2003; Robnik 2016; Mikić 2021a). Jezik poklicev je bil analiziran tudi z vidika načina ubesedovanja pogojev za delo v zaposlitvenih oglasih, kjer je bila zaznana raba besed, ki so pogosteje povezane z moškimi (kot npr. tekmovalen, agresiven), predvsem na t.i. tipičnih moških področjih (Gaucher, Friesen in Kay 2011). Več interdisciplinarnih raziskav moško slovnico obliko kot generično v zapisovanju poklicev analizira z vidika mentalnih predstav, ki jih te sprožijo pri bralcih in bralkah, pri čemer gre za ustvarjanje pričakovanj o (predvsem) moških kot pripadnikov poklicev (Stahlberg et al. 2007; Stout in Dasgupta 2011; Horvath in Sczesny 2016; Mikić Ljubi et al. 2022 idr.).

Analiza¹ temelji na pregledu jezika medijev (časopisov in revij), ki imajo pomembno vlogo pri ustvarjanju in ohranjanju diskurza v družbi, v katerem se odnosi med spoloma pogosto tematizirajo (Kalin Golob et al. 2018). K raziskovanju bomo pristopili z metodo feministične stilistike (Mills 1995), ki ponuja analizo jezika, osnovano na feministični perspektivi, da jezik odraža in reproducira spolne hierarhije. Primarno se bomo osredinili na leksikalno raven, kjer bomo analizirali (slovnice) oblike poklicnih nazivov, v analizo pa vključujemo tudi širšo pomensko oz. diskurzivno raven, ki poklicne nazive analizira skozi kontekst, v katerem se pojavljajo. Analiza bo izvedena s pomočjo gradiva treh časopisov/revij (Delo oz. Slovenski poročevalec, Gospodarski vestnik in Naša žena)

¹ Dosedanji razvoj na raziskovalnem področju spola in jezika je temeljil na obravnavi položaja moških in žensk (o tem najdemo tudi največ literature), zato se v članku osredotočamo na analizo dveh spolov. Kljub temu se zavedamo pomena in potrebe po preseiganju binarnosti spolov in upoštevamo spol kot fluiden, spremenljiv in kompleksen družbeni konstrukt, ki nastaja in se ohranja skozi družbene interakcije.

in skozi opazovanje štirih časovnih točk (leta 1958, 1978, 1998, 2018).² Ključno vprašanje, ki si ga v članku zastavljamo, je, na kakšen način se kaže seksizem pri poklicnih nazivih v izbranih časopisih/revijah in časovnih točkah oz. bolj splošno, kakšna je bila v obdobju med letoma 1958 in 2018 praksa zapisovanja poklicev v slovenskih medijih.

SEKSISTIČNI VIDIKI SLOVENSKEGA JEZIKA

V tem poglavju osvetljujemo vidike seksizma v slovenskem jeziku, ki so relevantni za našo analizo poklicnih nazivov. Primarno se tako usmerjamo na nezaznamovano rabo moškega slovničnega spola, pri čemer se (na podlagi prepričanja o njeni širini) moški slovnični spol uporablja kot nevtralna oblika pri zapisovanju poklicev. Takšna praksa prispeva k neenakovrednemu naslavljanju moških in žensk ter se kaže v pomanjkljivi rabi ženskih (poklicnih) poimenovanj. V poglavju o ženskih poklicnih poimenovanjih omenjamo tudi primere jezika kot odraza spolnih stereotipov, ki se kažejo predvsem v rabi ženskih poimenovanj (le) v povezavi s feminiziranimi poklici oz. poklici, ki tradicionalno veljajo za ženske.

Moška generična oblika

Moška generična oblika je po mnenju večine feminističnih jezikoslovc in jezikoslovcev ena najbolj zakoreninjenih oblik jezikovnega seksizma (Eckert in McConnel-Ginet 2003). Čeprav je nezaznamovanost moškega spola v slovenščini pravilo, ima ta več različnih oblik in razsežnosti. Najpogosteje se pojavlja kot množinska raba moških oblik kot nezaznamovanih. Množinska oblika glagola s končnico na -i je mnogokrat uporabljena kot retorično sredstvo (npr. zbrali smo se), ne glede na to, ali z njo naslavljamo spolno mešane skupine ali skupine, ki jih sestavljajo bodisi ženske bodisi moški (Kunst Gnamuš 1995, 258). Tuje raziskave opozarjajo, da takšna dvojna raba slovničnega spola, ki hkrati označuje moški spol in osebe, katerih spol je neznan ali nepomemben, oz. skupino ljudi obeh spolov, vodi v semantično dvoumnost, ki pogosto rezultira v ženski nevidnosti (Gygax et al. 2009; Gygax et al. 2012). Moško generično obliko najdemo tudi v edninskih (poleg množinskih) poimenovanjih, kjer moški spol označuje – specifično – točno določeno osebo moškega spola ali – generično – neko splošno idejo, in ne konkretne osebe, saj je »naravni« spol nevtraliziran (Stabej 1997, 63). Edninska generična raba moške oblike je praksa, ki jo je dolga leta narekovala jezikovna norma (primer rabe: Ana je arhitekt).³ Slovnična pravila so s posta-

² Analiza je del doktorske disertacije (Mikić 2020), ki je preučevala veliko širšo temo jezika in družbenih (ne)enakosti spolov na trgu delovne sile. Vsebovala je več raziskav, vse pa so bile interpretirane s pomočjo okoliščin politično-ekonomskih sprememb na trgu delovne sile in v jeziku v obdobju 1958–2018 v Sloveniji. V članku se konteksta ne poslužujemo in temeljimo zgolj na predstavitvi rezultatov analize časopisov/revij. Pri tem uporabljamo isto analizirano obdobje oz. štiri časovne točke (1958, 1978, 1998, 2018).

³ Gre za pravilo o slovnični nevtralnosti moške oblike, ki ne velja v stavčnih zvezah, kjer je žensko ime predmet ali osebek (npr. naša inštruktorka), in lahko velja, če je ime povedkovo določilo (npr. bila je hrabra komandirka in bila je hraber komandir – oboje pravilno) (Korošec 1998).

vljanjem moškega slovničnega spola v vlogo nezaznamovanega in generičnega v nekaterih primerih (v povednem deležniku) od žensk izrecno zahtevala, da se izražajo z moškimi slovničnimi oblikami (Bajec et al. 1964, 311; Kunst Gnamuš 1995, 259; Leskošek 2000, 420). Vse od leta 2001 so takšni primeri zabeleženi v Slovenskem pravopisu (862. člen) kot neknjižni⁴ (Toporišič et al. 2001, 98). Kljub temu pa v praksi velikokrat opazamo, da se z moško obliko še vedno pogosto naslavljajo tudi ženske, kar velja predvsem za področje poklicnih nazivov (glej Kozmik in Jeram 1995; Umek 2008; Kobal 2015).

Vpliv jezikovne norme, ki postavlja moški slovnični spol v vlogo splošnega oz. nevtralnega, je v slovenščini močno prisoten (Kambič 2008, 61) in ostaja (že več desetletij) nespremenjen. Predvsem jezikoslovna stroka (del jezikoslovcev in jezikoslovk) se v svoji argumentaciji v prid rabe moške generične oblike sklicuje na slovnična in ujemalna pravila, ki jih predpisuje slovenska slovnica. Moška slovnična oblika naj bi tako omogočala »(naj)večje izrazno razlikovanje in hkrati vključevanje« (Žele 2019, 144), delovala naj bi tudi kot najbolj obvestilno učinkovita. Je tudi manj morfemsko obremenjena, saj ima navadno glasovno prazno končnico, ženska oblika samostalnika, ki je izpeljana iz moške oblike, pa glasovno končnico -a (zaradi česar naj bi bila tudi zaznamovana) (Vidovič Muha 1997, 77).

Raba moškega slovničnega spola kot generičnega je problematična na več področjih – ne le v rabi posameznih izrazov, ampak predvsem v nekaterih slovničnih pravilih, ki služijo potrjevanju moške oblike in moškosti ter reguliranju vsakdanje rabe jezika (Leskošek 2000, 409, 423). Takšna jezikovna praksa je obravnavana tudi kot zapostavljanje žensk in ženskega slovničnega spola v jezikovnem sistemu (Bešter 1997, 10). Kot pravi Leskošek (2000, 414): »Seksizem v jeziku ni samo v tem, da se en spol postavi nad drugega, temveč v tem, da se s tem prikriva in zakriva žensko delovanje, njena aktivnost, participacija in razlike v možnostih.« Njena analiza kaže na očitno pomanjkanje omembe ženskih imen⁵ na račun rabe ene same spolne slovnične oblike (Leskošek 2000, 409). Takšno rabo avtorica označi za »lingvistični redukcijonizem«, ki rezultira v tem, da se pri omembi zgodovinskega dogajanja ustvarja slika samo o enem spolu, in nas opozori na potrebno previdnost pri rabi ene slovnične oblike za opisovanje dogodkov obeh spolov (Leskošek 2000, 413–14). Tovrstni primeri so bili najdeni tudi na področju poklicev oz. poklicnih poimenovanj. Raziskave (Gygax et al. 2008) so pokazale, da ima slovnična oblika⁶ poklica odločilno vlogo v tem, koga si bralci in bralke predstavljajo ob srečanju z besedo, ki naj bi predstavljala določeni poklic. To je problematično predvsem z vidika rabe moške slovnične oblike kot generične, saj pomemben nabor raziskav (Garnham et al. 2012, 484;

⁴ Primer neknjižne rabe: doktor Marja Boršnik, pravilno: doktorica Marja Boršnik.

⁵ Izgubljanje ženskih imen se kaže tudi v tem, da so dogodki, v katerih so omenjena, vrednoteni kot nepomembni (Leskošek 2000, 413).

⁶ To velja za jezike s slovničnim spolom, kot je slovenščina. Za jezike z nevtralnim spolom je bolj pomembna informacija, ki temelji na spolnih stereotipih.

Osterhout et al. 1997; Mikić Ljubi et al. 2022) dokazuje, da te na mentalni ravni sprožajo predvsem moško-specifične interpretacije.

Obojespolne oblike kot alternativa moški generični obliki

V zadnjih treh desetletjih se je (pri nas; v mnogih drugih zahodnih državah pa že prej) vzpostavilo prepričanje, da je treba uveljavljati rabo jezika, ki bi se izognila ali zmanjšala navzočnost spolne pristranskosti v jeziku. Ta vidik izpostavlja nezaznamovano rabo moške oblike kot odraz navajenosti in konvencionalnosti ter je ne vidi kot nespremenljivo dejstvo. To je še posebej relevantno za naš jezik, saj ima slovenščina – v primerjavi z nekaterimi drugimi jeziki – možnost prilagajanja slovničnega spola spolu nosnika,⁷ kar pomeni, da lahko slovnični spol prilagajamo spolu osebe, ki jo naslavljamo. To je velika prednost slovenskega jezika in lastnost, zaradi katere je pogosto neprimerljiv z drugimi jeziki (Leskošek 2000, 420; Pogorelec 1997, 6).

Kot alternativa rabi moške generične oblike je v slovenskem jeziku najpogosteje priporočana obojespolna oblika, tj. vzporedno navajanje ženskih in moških oblik, ki omogoča večjo vidnost obeh spolov v jeziku (Šauperl et al. 2018). Vendar pa raba obojespolnih oblik ni uveljavljena, predvsem zaradi mnenja, da povzroča monotonost, nerazumljivost, nejasnost in neberljivost besedila, dosledna obojespolna raba jezika pa naj bi besedilo tudi bistveno podaljšala (Umek 2008, 106). Razprave o seksističnem jeziku⁸ pri nas so vplivale na vzpostavitev dveh polov med strokovnjaki in strokovnjakinjami pri vprašanju jezikovnih alternativ moški generični obliki (Gorjanc 2017; Gorjanc et al. 2019). Del jezikoslovc in jezikoslovcev zagovarja strukturalni model, ki razume jezik predvsem kot nespremenljiv in se pri rabi jezika sklicuje na slovnična pravila, ki moško slovnično obliko kot generično zagovarja na osnovi argumenta gospodarnosti in lažje razumljivosti ter zavrača potrebo po obojespolnih oblikah. Na drugi pa so predvsem jezikoslovci in jezikoslovke, ki zagovarjajo poststrukturalni pristop k jezikoslovju, ki prepozna škodljivost nereflektirane rabe togih slovničnih pravil,⁹ zato se ne zanašajo na moško generičnost, ker naj bi bila bolj priročna in enostavna (kar je rezultat rutine in vladajoče ideologije). Ta argument načeloma

⁷ Ker je ujemanje med »spolskim slovničnim razredom« in »leksikalno specifikacijo« tega v slovenščini na primeru samostalnikov velika, se govor o nezaznamovanosti in »nadspolnosti« moškega slovničnega spola ne nanaša na biološki spol (čeprav ga naslavlja), ampak na družbeno ustvarjeni spol oz. na pomene, ki jih družba pripisuje določenemu spolu (moškim so pripisane pretežno zaželene lastnosti in ženskam nezaželene). To je tudi razlog, da se ženske lažje prepoznajo v moškem kot moški v ženskem (Leskošek 2000).

⁸ Tu se referiram predvsem na prvo javno razpravo Neseksistična raba jezika, objavljeno aprila 1995 (v organizaciji Urada za žensko politiko), ki je nastala na podlagi dokumenta Temeljna izhodišča prizadevanj za odpravo seksistične rabe jezika (Milharčič Hladnik in Žagar 1995), ter razpravo Spol in jezik, objavljeno 23. oktobra 2018, ki je nastala kot odgovor na burne reakcije uvedbe ženske oblike kot generične v pravnih aktih na Filozofski fakulteti.

⁹ Postavitev moškega spola kot nevtralnega in ženskega kot nenevtralnega je izrazita hierarhizacija, ki povečuje razliko med spoloma, po drugi strani pa so nekatere jezikoslovke in jezikoslovci zagovarjali prepričanje, da velja ravno obratno, tj. da izrecna omemba spolov povečuje njihovo neenakost (Leskošek 2000, 414).

podpirajo tudi sociolingvistke, sociolingvisti ter sociologinje in sociologi (tudi filozofi in filozofinje ter antropologi in antropologinje itd.).

Omenjene dosedanje razprave na tem področju so odprle prostor za razmisleke o tem, kakšne možnosti ponuja slovenski jezik za neseksistično rabo jezika, vendar niso prinesle konkretnih rešitev¹⁰ oz. konsenza o tem, kakšna naj bi bila neseksistična raba jezika, saj prevladuje mnenje, da uniformne rešitve niso najbolj ustrezne ali učinkovite in lahko prinesejo ravno nasprotno učinke; prav tako ne pridejo v poštev rešitve, ki so zaukazane s položajem moči. Na tej miselnosti temeljijo tudi Smernice o spolno občutljivi rabi jezika¹¹ (Šauperl et al. 2018), ki ponujajo dobro izhodišče za neseksistični jezik in navajajo več možnih in praktičnih pristopov k njegovi rabi (od rabe obojespolnih oblik, tvorjenja ženskih oblik, pomenske enakovrednosti imen žensk in moških do t. i. inovativnih vključujočih zapisov, ki se sklicujejo na rabo podčrtaja). Pri zagatah glede oblikovanja poklicnih poimenovanj za ženske si lahko pomagamo tudi s Standardno klasifikacijo poklicev (1997), ki vsebuje zapise vseh poklicev v ženski in moški obliki.¹² Kljub temu pa odločitve o rabi (ne)seksističnega jezika ostajajo predvsem na individualni ravni posameznega govorca ali govorce (pisca ali piske), ki z (ne) izbiro spolno bolj občutljivega jezika izraža tudi (ne)strinjanje (ali neozaveščenost) s takšno rabo.

Ženska poklicna poimenovanja

Poklicna poimenovanja so v slovenščini neposredni kazalnik spola osebe (zaradi končnic), ki jo naslavljajo (npr. zdravnik – m, zdravnica – ž), vendar se problem pojavi v nedoslednosti njihove rabe. To je v svoji raziskavi ugotavljala Bešter (1997, 21–22), ki je opazovala rabo ženskih poimenovanj v slovenskih uradovnih besedilih in ugotovila, da se ženska oblika uporablja zelo redko, navadno le v nagovorih v obvestilih in vabilih, manj pogosto pa v drugih delih teh besedil (Bešter 1997, 22). Do podobne ugotovitve je prišla tudi Kobal (2015), ko je v analizi glasila MOL (izdanega pred lokalnimi volitvami v letu 2014) opazovala poimenovanja kandidatke za županjo in mestne svetnice, pri tem pa ugotovila, da veliko število kandidatke nosi moška poimenovanja (Kobal 2015, 54–55). Leskošek (2000, 422) je (žensko) prakso prevzemanja moških nazivov

¹⁰ So pa prispevale k večji ozaveščenosti o temi spola in jezika na splošno.

¹¹ Smernice so nastale v sodelovanju Urada za enake možnosti (na MDDSZ) in Generalnega direktorata za prevajanje EK. Poleg smernic iz leta 2018 so v Sloveniji na voljo tudi Temeljna izhodišča prizadevanj za odpravo seksistične rabe jezika (Žagar in Milharčič Hladnik 1995), Priročnik za medije o upoštevanju načela enakih možnosti spolov (Hrženjak in Šribar 2004), Interne smernice za spolno občutljivo rabo jezika (Šribar 2010), Napotki za spolno občutljivo rabo jezika in praktični primeri dokonstrukcije nekaterih androcentričnih slovničnih pravil (Šribar 2014), Priročnik za medijsko poročanje o transspolnosti (Koletnik in Grm 2017).

¹² Spolno občutljiva raba jezika je bila obravnavana/urejana tudi v nekaterih strateških dokumentih. Najbolj eksplicitno je to področje urejala resolucija o Nacionalnem programu za enake možnosti žensk in moških (2015–2020), delno tudi Poslovnik državnega zbora (2002) in Nomotehnične smernice (2004) (za celoten pregled slovenskih jezikovnih politik glej Mikić 2020, 252–70). Omeniti pa velja, da se vse več organizacij in institucij odloča za oblikovanje svojih priporočil in usmeritev (npr. Univerza v Ljubljani).

(matematik, kemik, profesor ipd.) videla kot način, na katerega ženske z moškimi poimenovanji pridobijo tudi vse lastnosti, ki so tipično pripisane moškim.

Razlogov za neuporabo ali izogibanje ženskim poklicnim poimenovanjem je več. Večji del teh lahko pripišemo (še vedno) pogosti rabi (generične) moške oblike, ki se je dolgo časa uporabljala za poimenovanja večine poklicev, predvsem pa za visoke in vodilne položaje, ki so jih tudi pretežno zasedali moški, pa tudi v tem, da najvišje položaje še vedno prevzema manj žensk kot moških, kar (navidezno) upraviči manjšo rabo ženskih nazivov (Derganc 2017, 126). K manjši rabi ženskih poimenovanj zagotovo pripomore tudi (čeprav zastarelo, še vedno upoštevano) prepričanje, da besede, s katerimi označujemo naloge delavca ali delavke, same po sebi ne označujejo konkretnega spola osebe, ki to delo izvaja, ampak le njeno ali njegovo funkcijo (Stabej 1997, 58; Pogorelec 1997, 5). Ena od ovir rabe ženskih poklicnih poimenovanj je tudi, da so ta danes identična tistim, ki so jih v preteklosti uporabljali za naslavljanje žena nosilcev pomembnih funkcij, položajev in nazivov (npr. glavarice, davkarice, pekovke, mlinarice, ministrice, županje itd.)¹³ (Vidovič Muha 1997). Nekatere avtorice in avtorji so ugotavljali, da so lahko ženska poklicna poimenovanja problematična tudi zaradi pomenske enozvočnosti z besedami, ki jih uporabljamo za opisovanje stvari, strojev, orodij ali drugih pojavov (Umek 2008, 47) in lahko zato nosijo negativni prizvok.¹⁴ Hkrati pa velja, da za mnoge poklice do začetka devetdesetih let prejšnjega stoletja tudi še niso obstajali ženski izrazi.

Ženski poklicni nazivi lahko mnogokrat nosijo tudi zožene in pomensko različne predstave o poklicih – v primerjavi s tistimi, ki so zapisana v moški obliki. To se je potrdilo v raziskavi¹⁵ obojespolnih parov poklicev avtorjev Stopar in Ilc (2019), ki je pokazala, da moška in ženska oblika poklica ne nosita vedno enakih pomenov, predvsem na račun stereotipnih predstav o videzu, značaju in spolnih vlogah, ki pogosteje spremljajo ženske oblike. Na rabo (moške ali ženske) oblike poklicnega naziva vplivajo tudi (stereotipna) pričakovanja o primernosti določenih poklicev po spolu. Stopar in Ilc (2019, 335–36) sta ugotavljala, da »/.../ večjo pogostnost v korpusu pri besedi zdravnik lahko pripišemo generični rabi, medtem ko je večja pogostnost pri besedi sobarica posledica družbenega konteksta, saj gre za večinoma ženski poklic«. Šabec (2019, 295) podobno navaja primer medicinske sestre, kateri pripisujemo predvsem t. i. ženske lastnosti (nego, sočutje), medtem ko v primeru medicinskega tehnika preidejo v ospredje predvsem

¹³ Pri novotvorjenih ženskih poimenovanjih (predvsem za tiste poklice, ki so bili dolga stoletja vezani le na moške) je zato v preteklosti pogosto prihajalo do zmede zaradi njihove večpomenskosti.

¹⁴ S tem primerom se je srečal Korošec (1998, 79), ko je oblikoval Slovenski vojaški slovar (1977), saj je moral za določene izraze, zaradi potencialnega pomenskega zavajanja in asociacij z drugimi stvarmi ali dogodki, poiskati ustrezne alternative. Med takšna primere spadajo: brzostrelkinja namesto brzostrelka, ki je izraz za avtomatsko orožje, izvidničarka namesto izvidnice, ki predstavlja vojaško enoto, ipd.

¹⁵ V raziskavi je bila analizirana sopojavnost različnih poimenovanj z drugimi besedami. Pregled rabe ženskih poimenovanj je potekal na dveh podkorpusih zbirke FidaPLUS (1979–1990; 2000–2006), za več o metodologiji glej Stopar in Ilc (2019).

njegove strokovne kompetence. Pogorelec (1997, 5) je opozarjala na očiten primer semantične nesimetrije, tajnika in tajnice.¹⁶

METODOLOGIJA

Analiza poklicnih nazivov je potekala v več korakih. Najprej je bil narejen izbor časopisov/revij in izbrano obdobje opazovanja. V analizo so bili vključeni: časopis Delo (in ena številka Slovenskega poročevalca kot predhodnika Dela v letu 1958), reviji Naša žena in Gospodarski vestnik. Medije, ki so bili predmet analize, smo v grobem opredelili kot javna publicistična besedila, namenjena širši javnosti, oz. novinarska besedila (Slovenski poročevalec/Delo; dalje SP in Delo) in besedila, namenjena specifični javnosti (reviji Naša žena in Gospodarski vestnik; dalje NŽ in GV). Gre za tri vsebinsko zelo različne revije/časopise, ki pokrivajo za našo analizo ključna področja (in izhodišča za primerjavo): splošno poročanje (kot nevtralno), poročanje o družini/ženskah; poročanje o gospodarstvu (kot moško-dominantni temi). Pristop k analizi vsake revije ali časopisa je bil ustrezno prilagojen¹⁷ (glej Tabelo 1). Analiza je zajemala štiri časovne točke: leta 1958, 1978, 1998 in 2018, da bi lahko zagotovili tudi vpogled v razlike v rabi oblik poklicnih nazivov v obdobju 1958–2018.

V drugem koraku smo identificirali področja, ki jih želimo raziskati. To so bila poimenovanja poklicev¹⁸ (moški, ženski, obojespolni nazivi, splošno (poklicno) naslavljanje v edninskih in množinskih situacijah). Ko so se začeli določeni poklicni nazivi ponavljati in je prišlo do saturacije, jih v nadaljevanju nismo večkrat zapisali, saj je bil cilj pridobiti splošno informacijo o tem, v kakšnih oblikah se pojavljajo. Opredeljeni so bili tudi deli časopisov/revij, ki jih nismo vključili v analizo.¹⁹

¹⁶ Beseda, ki označuje poklic, zapisana v moški slovnični obliki, opisuje tudi drugačno delovno mesto in odgovornosti (tajnik je zadolžen za vodstvene naloge in se navadno pojavlja v asociaciji z glavni tajnik, državni tajnik; tudi sekretar) kot beseda, ki označuje isti poklic v ženski slovnični obliki (tajnica kot osebna pomoč). Posledica tega je, da se številne tajnice ne želijo identificirati s tem nazivom in raje prevzemajo moško obliko poimenovanja dejavnosti (Umek 2008, Kranjc in Ožbot 2013; Smolej 2021).

¹⁷ Raven obsega analize – koliko števil je bilo vključenih v analizo; raven predmeta raziskovanja.

¹⁸ V analizo smo tako vključevali le konkretne poklicne nazive (npr. primeri, kjer je bilo zapisano »ko nekdo dela v trgovini«, in ne konkretni naziv, npr. »trgovce«, niso bili vključeni v analizo; tudi ne splošni izrazi za službe, npr. »policija«).

¹⁹ Sem spadajo prispevki, ki ne omenjajo poklicev/poklicnih nazivov ali spola, razna promocijska sporočila, priloge ipd.

- Seksizem v poimenovanih poklicih? Analiza poklicnih nazivov v slovenskih časopisih in revijah...

Tabela 1: IZBOR ČASOPISOV IN REVIJ PO LETIH

Revija/časopis*	Leto	Izbrane številke (meseči)
Slovenski poročevalec/Delo	1958 1978 1998 2018	marec, maj, julij/september, december ^a
Gospodarski vestnik ^b	1958 1978 1998	vse številke ^c
Naša žena ^d	1958 1978 1998	marec, maj, julij/september, december

* NŽ in GV sta prenehali izhajati do leta 2010, zato je bil v analizo za leto 2018 zajet samo časnik Delo. Glede na to, da živimo v tem času (smo nenehno informirani o dogodkih in spremljamo pisanje v časnikih vsak dan), so bili podatki, ki smo jih pridobili iz časnika Delo, povsem zadovoljivi, da smo si ustvarili ustrezno kontekstualizacijo rabe (ne)seksističnega jezika v časopisju za leto 2018.

^a Marec (zaradi omembe dneva žena), maj (zaradi omembe praznika dela), julij/september (julij zaradi omembe sezonskih delavcev ali delavk; september zaradi začetka posezonskega dela in šole) in december (kot zadnji mesec v letu, ko se povzema celotno leto). Meseca julij in september sta izbrana izmenjujoče se (vsak od mesecev po dvakrat). Analiza zajema številke časopisov na 8. dan v mesecu (8. 3., 8. 5., 8. 7./8. 9., 8. 12.), kot podlaga za to je dan žena (na ta dan se navadno več piše o ženskah). Ista metodologija je uporabljena tudi pri analizi GV in NŽ.

Obseg časopisa se je skozi leta spreminjal: leta 1958 je vsebovala ena številka 8 (velikih) strani, leta 1978 že 16 velikih strani, leta 1998 20–24 strani, leta 2018 pa 24 strani. *Potek analize*: pregled celotne številke, izpis omembe vseh poklicnih nazivov, poudarek na omembah žensk in moških v poklicih oz. s poklicnimi nazivi.

^b Ker ni izhajal v celotnem analiziranem obdobju (manjka leto 2018), so v pregled vključene le tri časovne točke (1958, 1978 in 1998).

^c V analizo so vključene vse številke v izbranih treh letih (1958, 1978 in 1998), v letu 1958 izhaja revija vsako sredo in soboto, tj. 2 številki tedensko po približno 6 (do max 16) velikih strani (skupaj 100 izvodov v letu 1958); v letu 1978 izhaja 3- do 5-krat mesečno (vsaka številka ima 66–98 strani), v letu 1998 pa 4- do 5-krat na mesec (vsak četrtek) in vsebuje 82–114 strani na številko. Ker je gradiva po obsegu več kot v prvih dveh revijah/časopisih, smo se pri GV osredotočili samo na pregled naslovov, podnaslovov in uvodnih odstavkov oz. vsega, kar še ni besedilo prispevka, ostalo besedilo prispevka pa preleteli. Če so omenjeni poklicni nazivi in/ali ženske v naslovih/podnaslovih, je sledil tudi pregled vsebine članka.

^d Kljub temu da smo v analizo vključili manj števil NŽ (zaradi manjkajočega leta 2018), kot v primeru Slovenskega poročevalca/Dela, pa so številke Naše žene po obsegu večje (leta 1958 v povprečju med 30 in 40 strani; leta 1978 okoli 60 strani; poletna številka kar 76 strani, leta 1998 pa okoli 90 strani). Potek analize: pregled vseh novic v izvodu, poudarek na poklicnih nazivih, izpis teh in ugotavljanje, v kakšni obliki se pojavljajo, način splošne rabe jezika (prisotnost generične oblike). Glej opombo 39.

Vir: Lastna analiza.

V tretjem koraku smo nato izbrali metodo, ki bo kar najbolje zajela posebnosti tematik, ki jih želimo raziskati. Izhajali smo iz kvalitativne deskriptivne metode z uporabo feministične stilistike avtorice Sare Mills (1995), ki analizo besedil središči na spolu in išče razlage za pojavljanje pristranskosti v jeziku v feministični literaturi. Feministična stilistika povezuje jezik besedil z zunajbesedilnimi političnimi procesi in izhaja iz kritične lingvistike ter kritične diskurzivne analize. S preučevanjem sloga in vsebine besedila feministična stilistika odkriva tako očitne kot subtilne oblike seksizma ter kritično ocenjuje upodabljanje

ženskosti (Mills 1995). Vključuje tri ravni analize jezika: leksikalno, skladenjsko in diskurzivno raven. Za potrebe analize smo se osredotočili le na dve ravni: na leksikalno raven (raven besed), kjer smo opazovali oblike zapisa poklicnih poimenovanj, ki so bile uporabljane za naslavljanje žensk in moških. Opazovali smo rabo moške generične oblike (ki je, po feministični teoriji, znamenje večvrednosti moške prezenca in izkušnje, s katerimi zakriva/zanika prisotnost ženske) kot spolno specifične in zato izključujoče ter rabo ženskih oblik (pogostost, obliko) kot označenih (ki sugerirajo, da so ženske odklon od (moške) norme). V analizo smo vključili tudi spremljanje pojavljanja obojespolnih oblik kot vključujočih do obeh spolov. Pomembno se nam je zdelo vključiti tudi širšo makro (diskurzivno) raven analize, kjer so vsi pojavi v jeziku videni kot del širših struktur in vzorcev, ki lahko določajo ali vplivajo na pojavljanje posameznih leksikalnih enot v določenem trenutku. Tu smo opazovali predvsem poklicna poimenovanja v povezavi s konteksti, v katerih se pojavljajo, npr. pogostost pojavljanja (moških/ženskih) poklicnih nazivov, medij pojavljanja (v kateri reviji/časopisu), prisotnost povezovanja družbenih/spolnih in poklicnih vlog.

Vse izvode časopisov in revij smo pridobili v Narodni in univerzitetni knjižnici (dalje NUK); ker so bili ti izvodi dostopni samo v NUK-u, smo večji del analize opravili tam. IZpisovanje gradiv je potekalo ročno, saj si s programsko tehnologijo²⁰ (npr. programi Nvivo, Atlas), ki omogoča analizo velikega obsega gradiv, nismo mogli pomagati. Postopek analize je potekal v več fazah. Najprej smo zbirali podatke po posameznih časopisih in letnicah, potem pa smo ključne informacije združili po letnicah, da bi omogočili primerjavo med leti. Sledila je analiza, ki ni bila vezana na razporejanje po časopisih/revijah ali letnicah, ampak je združevala vsebino glede na glavne teme, ki smo jih opazovali v poročanju.

Analiza, ki jo predstavljamo, je opisna,²¹ zato ne omogoča (statističnih) oz. številčnih primerjav med različnimi letnicami oz. časopisi/revijami, prav tako ne moremo govoriti o natančnih frekvencah in pogostosti pojavljanja določenih poklicnih nazivov, ampak lahko podamo samo splošen vtis. Pri tem se poslužujemo štetja in primerjanja (tj. ali se pojavljajo določene oblike (moške, ženske, obojespolne) in katere se večkrat, v kakšnih kontekstih, katere se nikoli ne pojavijo itd.).

REZULTATI

V nadaljevanju predstavljamo izsledke in nekatere ključne ugotovitve analize poklicnih nazivov v slovenskih časopisih in revijah.²²

²⁰ Programske tehnologije se nismo posluževali, ker so bili izvodi, ki smo jih pridobili iz NUK-a v elektronski obliki, slabe kvalitete, poleg tega je bila večina datotek shranjenih v obliki slike (.jpg), kar je onemogočalo označevanje le delov besedila v časopisu/reviji.

²¹ Gre za značilnost feministične stilistike kot metode raziskovanja, katere preučevanje temelji na sistematičnem opisu dejstev ali značilnosti predmeta raziskave (Mills 1995).

²² Ker smo vključili v analizo tri tematsko popolnoma različne časopise/revije, je bilo podajanje jasne oz. enoznačne predstave o rabi jezika v novinarskem pisanju v analiziranem obdobju zelo oteženo. Zato so ponekod dodane obrazložitve oz. označene izjeme. Rezultati niso strogo ločeni na izsledke

V zapisovanju poklicev prevladuje moška slovnična oblika

Analiza vseh treh časopisov/revij je pokazala, da je bila v izbranih štirih časovnih točkah pri zapisovanju poklicev pogosto v rabi moška slovnična oblika kot generična. Pri tem so bili najpogostejši primeri, ko je šlo za pisanje o poklicih na splošno (npr. omenjeni so primeri poklicev, kot so, recimo, »gospodarstveniki«, »obrniki« itd.) ali ko je šlo za množinsko situacijo, pri čemer je bila lahko mišljena spolno mešana, spolno neopredeljena ali samo moška skupina ljudi, ki opravlja določeni poklic (primer naslavljanja spolno mešane skupine ljudi: »člani Zveznega izvršnega sveta dr. Marijan Breclj, Lidija Šentjurg in Sergej Kraigher«).

Izjemo od moške generične oblike v splošnem naslavljanju poklicev je bilo mogoče zaznati pri (nekaterih, ne vseh) primerih poklicev, ki veljajo za tradicionalno ženska področja, npr. »knjižničarka«, »gospodinja«, »perica«, »hišna pomočnica«, »služkinja«. Večina vseh poklicev, tudi nekaterih tradicionalno ženskih (oz. poklicev, v katerih so prevladovale ženske), je kljub temu večinoma zapisana v moški obliki: npr. »vzgojitelji«, »hišni služabniki«, »socialni delavci«. To velja predvsem za prvi dve leti analize. V letih 1958, 1978 in 1998 se pojavijo tudi primeri, v katerih so bile z rabo moške (generične) oblike naslavljanje skupine oseb, ki so jih sestavljale samo (neposredno poimenovane) ženske (neposredno: »solisti Bisera Veletanlić in Marjetka Falk«; posredno: primeri, v katerih celotna novica govori o ženskah, npr. kmetice, in v katerih se tudi omeni ženski naziv (npr. »kmetica«), v nadaljevanju pa se (čeprav je jasno, da je govor o ženskah) uporablja moška generična oblika, npr. »kmetovalec«, »nosilec kmetijske dejavnosti«).

Moški so vedno naslavljeni s poklicnimi nazivi v moški obliki

Poklicni nazivi, ki so se uporabljali za naslavljanje moških v časopisnem poročanju, so bili vedno in v vseh analiziranih časovnih točkah zapisani v moški slovnični obliki. Moški poklicni nazivi so bili navadno zapisani s polnim delovnim/poklicnim nazivom (tudi z izobrazbenim nazivom, če ga je imela oseba, npr. dr., inž., oz. z nazivom tovariš v letih 1958 in 1978). V večini je šlo za nazive, ki opisujejo osebo moškega spola, vendar imena ne omenjajo (npr. »predsednik«, »zunanji minister«, »direktor«), ali pa nazive, ki stojijo pred imenom in priimkom moškega (npr. »pisatelj Slavko Grum«, »režiser Stele Janković« itd.).

Raba ženskih poklicnih nazivov ni dosledna, se pa povečuje po letih

Analiza je pokazala, da se raba ženskih poimenovanj z leti spreminja, pri čemer beležimo trend povečevanja prisotnosti ženskih poklicnih poimenovanj v analiziranem obdobju (od leta 1958 do 2018). V prvih dveh analiziranih letih 1958 in 1978 so poklicni nazivi, ki se uporabljajo za ženske, zapisani bodisi v

leksikalne in diskurzivne analize, čeprav je lahko zaznati, da se predvsem ugotovitve 1–4 navezujejo na analizo na ravni besed in da ugotovitvi 5 ter 6 opisujeta izsledke diskurzivne analize.

ženski bodisi v moški obliki, pri čemer velja, da je bila raba ženskih poklicnih poimenovanj dosledna v SP in Delu (v letu 1958, večinsko v letu 1978), medtem ko zapisi ženskih poklicnih poimenovanj v GV in NŽ niso bili vedno skladni z ženskim spolom. Predvsem za GV velja, da je bilo pri naslavljanju žensk na visokih položajih veliko ženskih poimenovanj še vedno zapisanih v moški obliki,²³ medtem ko najdemo ženske v drugih (tudi nižjih) poklicnih vlogah v GV leta 1978 z zapisom poklicnega naziva v ženski obliki.²⁴ Podobno velja za leto 1978 tudi v NŽ, kjer je sicer veliko ženskih poimenovanj v ženski obliki, kljub temu pa najdemo tudi primere, ko je ženska naslovljena z moško obliko poklica.²⁵

Raba ženskih oblik poklicev je postala bolj redna v primerih, ko je šlo za opisovanje (konkretnih, poimensko navedenih)²⁶ žensk v devetdesetih letih dvajsetega stoletja, in to velja za vse tri revije/časopise. Podobno prakso vidimo tudi v letu 2018. Omeniti velja, da se je od leta 1998 v vseh analiziranih časopisih/revijah delež omemb žensk – v primerjavi s predhodnima analiziranimi letoma – močno zvišal (kljub temu pa so ostale ženske v Delu in GV še vedno omenjane manj pogosto kot moški, medtem ko velja za NŽ obratno), kar je razvidno tudi v spektru poklicev, v katerih so bile ženske omenjane (pogosteje na položajih moči; med drugim se pojavi tudi izraz »menadžerka«). Pojavijo se tudi nazivi, ki jih v ženski obliki še ni bilo mogoče zaznati, npr. »defektologinja«, »direktorica nuklearne medicine«, »pekinja«, »kiparka«, »arhitektka« itd; vendar so zelo redki (pojavijo se enkrat do dvakrat), manj je nekaterih drugih poklicev (»gospodinja« itd.). V letu 2018²⁷ se ženske že redno pojavljajo v poročanju (v primeru Dela²⁸), vendar še vedno ne tako pogosto kot moški.

Raba obojespolnih poklicnih poimenovanj le, ko gre za izrecno povezovanje z ženskami

Obojespolna poimenovanja poklicev so bila zelo redko v rabi, kar velja za vse tri revije/časopise. Pogostejša so bila v splošnem naslavljanju poklicev (raba obojespolnega para »delavci in delavke«) kot v konkretnih primerih poklicev. Analiza kaže, da so bila obojespolna poimenovanja prisotna predvsem ko gre za izrecno povezovanje (ali omemba/sodelovanje/naslavljanje) z ženskami v

²³ Primeri: »podpredsednik Dušana Kovačević«, »beograjski sodelavec tov. Bosa Jovovičeva«.

²⁴ Primeri zapisov v ženski obliki: »zdravnica obratne ambulante in strokovnjakinja medicine dela v Saturnusu dr. Dagmar Bencon«, »socialna delavka Marja Sedlaček«, »Draga Brezovnik, direktorica TOZD Detalj v Nami«. Na prvi strani je med odgovornimi navedena tudi »glavna urednica in direktorica TOZD GV Alenka Mišič«.

²⁵ Primeri: »Gospa kapitan je na komandnem mostu«; »Agata Calanna postala kapitan«, »povedala, da je kadet«, »tiste, ki bodo študirale bodo postale mornariški častniki« itd.

²⁶ Zato se pri ženskah v NŽ pogosteje pojavlja zapis poklica v edninski obliki (za razliko od moških poklicnih nazivov, kjer so pogostejši zapisi v množinski obliki).

²⁷ V marčevski številki so omenjane pogosteje kot v drugih številkah Dela v letu 2018.

²⁸ V letu 2018 se v pisanju v Delu sicer moški še vedno pogosteje pojavljajo s poklicnimi nazivi kot ženske, vendar razlike niso zelo velike.

zgodbi. Vendar pa mnogokrat obojespolnemu poimenovanju (ki se pojavi ob prvi omembi) sledi samo moška oblika, ki se samostojno uporablja v nadaljevanju besedila.²⁹

Ženski poklicni nazivi najpogostejši v splošnih in tradicionalno ženskih poklicih, moški poklicni nazivi po večini vezani na položaje v politiki in gospodarstvu

Analiza kaže, da so bili v splošnem časniku SP/Delu ženski nazivi sprva vezani predvsem na tradicionalne ženske vloge, tj. »prodajalke«, »varuške«, »gospodinje« itd., kasneje so prevladovali ženski nazivi v novicah o kulturi (1998) in nazadnje v političnem in gospodarskem poročanju (2018).³⁰ V specializirani gospodarski reviji GV so se ženski poklicni nazivi pojavljali v vseh analiziranih letih predvsem v povezavi z visokimi položaji v gospodarstvu in politiki, vendar so bile kljub temu ženske redko omenjane. V tematsko družinski/ženski reviji NŽ pa je bilo vedno možno najti zelo širok nabor raznolikih del, v povezavi s katerimi so bile ženske omenjane, od visokih političnih do položajev v kulturi in umetnosti itd.

Ker so moški v vseh štirih analiziranih letih predstavljeni predvsem v svoji poklicni vlogi, kot politiki in podjetniki, so tudi najpogostejši moški nazivi, ki se pojavljajo (predvsem v SP/Delu in GV), vezani na poklice oz. položaje, ki imajo visok prestiž in ugled v politiki ali gospodarstvu (poudarek na politiki je bolj viden v splošnem časniku, na gospodarstvu pa v GV, čeprav sta v obeh prisotni obe temi), ki tudi tradicionalno veljata za moški področji. Moške so tako najpogosteje spremljali poklicni nazivi, kot so npr. »predsednik«, »minister«, »premier«, »uradniki«, »analitiki«, »ekonomisti« itd.³¹ Moški nazivi so bili prisotni tudi na drugih področjih, z leti pa se je povečal obseg poklicev in poklicnih nazivov, v katerih so bili predstavljeni. V SP oz. Delu gre za širši spekter različnih splošnih poklicev, kar je tudi skladno s tem, da gre za splošen časnik, ta nabor pa se z letom 1998 še bolj razširi: z razvojem novih poklicev (npr. marketing), z vlogami, ki jih prevzemajo moški ter zaradi dodajanja novih rubrik³² v tistem času. Po drugi strani pa so poklicni nazivi v GV večinoma še vedno vezani na visoke oz. strokovne položaje in je manj poklicev, ki so bolj splošni oz. jih zaseda večina prebivalstva. To se v GV spremeni leta 1998, predvsem na račun novih tem,³³ ki jih zajema nova različica revije in zaradi pojavljanja novih izrazov, npr. menedžer. Za razliko od omenjenih časopisov/revij pa je v NŽ na splošno

²⁹ To je bilo izrecno opaženo v letih 1978 in 1998. Primer (NŽ, 1978): novica o ženskah v gumarskem poklicu, kjer se na začetku pojavi nagovor učenke in učenci, v nadaljevanju pa se uporablja samo učenci – čeprav je novica o ženskah.

³⁰ Predvsem, ker smo za zadnje leto vzeli v analizo le časnik Delo.

³¹ Ženske so v teh kontekstih v SP (ne pa v GV in NŽ) pogosto omenjane kot soproge funkcionarjev.

³² Delo uvede novo rubriko Marketing, tudi Poslovno delo, v kateri so na dveh straneh objavljene novice s finančnih trgov.

³³ Zato lahko najdemo med poklicnimi nazivi tudi profesorje, zdravnike, fizične delavce itd.

manj moških nazivov poklicev in manj takšnih, ki sodijo v visoko politično in gospodarsko sfero, ter več poklicev oz. poklicnih nazivov, ki so bolj splošni (npr. zdravniki, pesniki, gozdarji, avtomehaniki, poštarji itd.).

Pogostost pojavnosti poklicnih nazivov v moški ali ženski obliki v veliki meri odvisna od tematik revije/časopisa

Analiza je pokazala, da so bili moški poklicni nazivi omenjeni pogosteje kot ženski poklicni nazivi na primeru poročanja v dveh revijah/časopisih: v SP/Delu in GV. V teh časopisih/revijah je bilo tako mogoče zaznati več omemb moških (posledično tudi moških poklicnih nazivov), saj je bilo največ novic vezanih na omembo visokih in vodilnih položajev v politiki (SP/Delo), pa tudi položajev v gospodarstvu (GV) (v katerih so bili moški omenjeni in ki tudi tradicionalno veljajo za moška področja). Moška poklicna poimenovanja so bila pogosto tudi del novic na prvi/naslovni strani revije/časopisa, ki so navadno namenjene najpomembnejšim in najbolj izpostavljenim novicam.

Medtem ko je v SP/Delu in GV le nekaj prispevkov, katerih vsebine se v celoti posvečajo poročanju o ženskah (in prevladujejo prispevki o moških), pa je v NŽ večina prispevkov namenjena ženskam oz. obravnava ženske. V pisanju ženskam namenjene revije NŽ so bila tako pogostejša ženska poklicna poimenovanja, v NŽ je bilo mogoče najti tudi najširši nabor različnih poklicev in omemb, ki se pojavljajo v ženski obliki (od visokih političnih do položajev v kulturi in umetnosti itd.). Ženska poklicna poimenovanja so bila v primeru SP/Dela skopa in splošna (tj. zajemajo vloge »gospodinje«, »pesnice in prevajalke«, »zdravnice« idr.); pojavljajo se bolj proti koncu časnika, v manj izpostavljenih rubrikah (npr. »iz naših krajev«, »kultura/znanost/šolstvo«, »kronika«, »mnenja in komentarji« itd.). Tudi v GV so ženske redko omenjene, saj gre za revijo, ki najpogosteje omenja poklicne nazive visokih funkcij. Tudi omenjanje in citiranje žensk je bilo v Delu in GV redko (zelo pogosto so citirani moški).³⁴ Popolnoma nasprotno velja za NŽ, kjer so ženske najpogosteje omenjane in se pojavljajo v večini vseh rubrik.

Povzetek vseh ključnih ugotovitev je prikazan v Tabeli 2.

³⁴ Izjema so rubrike, v katerih gre za mnenja in komentarje, tudi pisma bralcev, kjer se pogosto pojavi kakšen prispevek avtorice, ali pri omembah pridelkov, kmetovanja, doma.

- Seksizem v poimenovanjih poklicev? Analiza poklicnih nazivov v slovenskih časopisih in revijah...

Tabela 2: PRIMERJAVA RABE POKLICNIH POIMENOVANJ (V ŠTIRIH ČASOVNIH TOČKAH IN V TREH ČASOPISIH/REVIJAH)

Poimenovanja poklicev/leto		1958	1978	1998	2018
Moška poklicna poimenovanja	<i>Zapis</i>	Vedno v moški slovnični obliki	Vedno v moški slovnični obliki	Vedno v moški slovnični obliki	Vedno v moški slovnični obliki
	<i>Pojav-ljanje (najbolj)</i>	V politiki in gospodarstvu (SP in GV) in splošnih poklicih (NŽ)	V politiki, gospodarstvu (Delo in GV) in splošnih poklicih (NŽ)	V politiki, gospodarstvu (Delo in GV) in splošnih (tudi fizičnih) poklicih (NŽ)	V politiki in gospodarstvu
Ženska poklicna poimenovanja	<i>Zapis</i>	Samo v ženski (Delo) ter v ženski in moški slovnični obliki (GV in NŽ)	Samo v ženski (Delo) ali v ženski in moški slovnični obliki (GV in NŽ)	Večinoma v ženski slovnični obliki	Večinoma v ženski slovnični obliki
	<i>Pojav-ljanje (najbolj)</i>	Splošni (tudi tradicionalni) poklici (SP in NŽ), politika in gospodarstvo (GV)	Tradicionalne poklicne vloge (Delo), splošni poklici (vsa področja; NŽ), politika in gospodarstvo (GV)	Kultura (Delo), splošni poklici (vsa področja; NŽ), politika in gospodarstvo (GV),	Politika in gospodarstvo
Obojespolna poklicna poimenovanja	<i>Zapis (oblika)</i>	Moški in ženski naziv	Moški in ženski naziv; <i>izjema: mornariški častniki (častnice?), kapitan–kapitanka?</i>	Moški in ženski naziv	Moški in ženski naziv; <i>izjema: najučitelj/ica</i>
	<i>Pojav-ljanje</i>	Zelo redko	Redko	Zelo redko	Redko

Vir: Lastna analiza.

DISKUSIJA IN SKLEP

Članek obravnava področje spola in jezika ter predstavi analizo poklicnih poimenovanj, ki so se pojavljala za naslavljanje ženskih in moških v obdobju od leta 1958 do 2018 v treh analiziranih slovenskih časopisih in revijah. S pomočjo analize smo skušali ugotoviti, kakšna je bila praksa zapisovanja poklicev v slovenskih časopisih/revijah, s posebnim poudarkom na pojavnosti seksizma v jeziku. Ugotovitve kažejo, da se je zapisovanje poklicnih nazivov v analiziranem obdobju spreminjalo: tako v pogostosti rabe moških in ženskih slovničnih oblik kot tudi v rabi konkretnih izrazov za naslavljanje moških in žensk, hkrati pa je bilo možno na primeru poklicev zaznati tudi znake seksizma v jeziku, ki so bili najpogosteje povezani z uveljavljeno jezikovno normo, delno pa tudi kot odraz

spolnih stereotipov in predsodkov. Nekaj teh primerov predstavljamo v nadaljevanju.

Izsledki analize kažejo, da je pri naslavljanju poklicev prevladovala moška (generična) oblika, ki je bila v rabi: 1) za naslavljanje moških v poklicih; 2) za naslavljanje poklicev na splošno, ko so omenjeni primeri poklicev, npr. policisti, politiki oz. v množinskih situacijah, v katerih je lahko mišljena spolno mešana, spolno neopredeljena ali samo moška skupina ljudi, ki opravlja določeni poklic; 3) ponekod tudi za naslavljanje posameznih žensk ali skupine žensk. Miselni procesi, ki se nam sprožijo ob srečanju z besedo za poklic v moški obliki, so samodejni in prispevajo k ustvarjanju (zgodovinske) podobe o (samo) moških kot nosilcih poklicnih funkcij oz. tistih, ki so se udeleževali v javni sferi (Leskošek 2000; Gygaš et al. 2008; Garnham et al. 2012, Mikić Ljubi et al. 2022). Takšna široka in splošna raba samo enega slovničnega spola je z vidika slovničnih pravil, ki veljajo za slovenščino, vključevalna in obvestilno učinkovita (Vidovič Muha 1997), z vidika feministične teorije pa problematična, saj ne omogoča enakovrednega naslavljanja moških in žensk, hkrati pa s pravilom »moški zajema tudi žensko« zagotavlja oz. ohranja nevidnost žensk v strukturi jezika in širše ter ustvarja zgodovinsko podobo o prisotnosti samo enega spola (Spender 1980; Irigaray 1995; Rowbotham 1973; Mills 2008; Leskošek 2000 itd.). Prepričanje o nezaznamovanosti moške oblike je nenehno potrjevano s slovničnimi in pravopisnimi pravili in je globoko ukoreninjeno v medijski in vsakdanji rabi jezika, kar je bilo mogoče zaznati v analizi poklicnih poimenovanj v časopisih/revijah.

Prevlada pomensko spolno nevtralnih moških oblik za naslavljanje spolno mešanih skupin ljudi je zavirala uveljavljanje tako ženskih kot obojespolnih poklicnih poimenovanj ali drugih jezikovnih alternativ moški obliki (saj moška oblika, po pravilih, popolnoma ustrezno naslavlja oba spola). To je v analizi razvidno iz (vedno) manjšega deleža ženskih poklicnih poimenovanj³⁵ (razen v specifični ženski reviji NŽ) in obojespolnih oblik v primerjavi z moškimi poklicnimi nazivi, pa tudi v tem, da so bile izrecno poimenovane ženske (z imenom in priimkom) mnogokrat naslavljane z moško obliko. Pri slednjem bi lahko govorili o pojavu seksizma v jeziku, ki izvira iz nedoslednosti zapisovanja poklicnih nazivov v obliki, ki bi ustrezala spolu posameznika ali posameznice. Takšnih primerov je bilo veliko (v prvih treh analiziranih letih), kljub temu da v slovenščini relativno enostavno (z dodajanjem končnic) tvorimo ženske slovnične oblike in imamo možnost slovnični spol prilagajati spolu osebe, ki jo naslavljamo (Leskošek 2000; Pogorelec 1997). Vendar pa je na situacijo treba vseeno pogledati nekoliko širše in poiskati vzroke za razlike v naslavljanju moških in žensk tudi v dejstvu, da za mnoge poklice v zgodnjih letih analize (1958 in 1978) še niso obstajale ženske oblike poklicnih poimenovanj oz. ni bilo potrebe po njihovem tvorjenju, saj so bila vse do leta 2001 (edninska) naslavljanja žensk z moškimi

³⁵ Najbolj dosledna raba ženskih poklicnih poimenovanj je bila v splošnem poročanju (Delo), manj v poročanju o gospodarstvu ali družini/ženskah.

nazivi v Slovenskem pravopisu označena kot slovnično ustrezna (Korošec 1998; Toporišič 1976). Tudi kasneje (leta 1998 in 2018), ko se je raba ženskih oblik v poklicih že nekoliko bolj uveljavila, so lahko k njihovi nedosledni rabi vplivale slabšalne, manjvredne in ironizirane konotacije ženskih poimenovanj (Mills 2008), ki odvrtačajo govorce/bralke od samoidentificiranja z njimi, pa tudi govorce in govorke/pisce in piske na splošno od rabe teh oblik.

Omeniti je treba tudi nekatere primere, pri katerih se izkaže, da na rabo (moške ali ženske) oblike poklicnega naziva vplivajo tudi drugi dejavniki,³⁶ kot so družbeni kontekst, družbeni spol in/ali (stereotipna) pričakovanja o primerčnosti določenih poklicev po spolu (Stopar in Ilc 2019) oz. ko ti dejavniki prevladajo nad slovničnimi pravili. Primer tega so nekateri ženski poklicni nazivi (predvsem v prvih analiziranih letih), ki so se pojavljali le v povezavi s tradicionalno ženskimi poklici, splošnimi poklici in poklici v kulturi (oz. poklici/področji, na katerih so prevladovala ženske), po drugi strani pa je bilo mogoče zaznati prevlado poklicnih nazivov v moški slovnični obliki v gospodarstvu in politiki. Raba različnih poklicnih poimenovanj za naslavljanje moških in žensk (oz. raba nekaterih poimenovanj za ženske in drugih za moške) je dokaz tega, da so spolni stereotipi, ki so povezani z določenimi poklici, v nekaterih primerih sposobni preseči vpliv pravila moške generične oblike, kar so pokazale tudi nekatere tuje raziskave (npr. Gygaš et al. 2008; Gabriel et al. 2008; Merkel 2013 idr.). Kaže pa tudi na dejstvo, da je jezik odraz situacije v družbi in na trgu delovne sile, kjer prevladujejo poklici, ki so maskulinizirani in feminizirani (Kanjuo Mrčela et al. 2016), kar posledično vpliva tudi na spolno specifično rabo jezika pri naslavljanju žensk in moških v teh poklicih. Raziskave trga dela v obdobju 1958–2018 v Sloveniji (Mikić 2020) kažejo, da so bili moški pogosteje kot ženske zaposleni na visokih gospodarskih in političnih položajih³⁷ (v katerih se tudi najpogosteje pojavljajo v poročanju), ker pa so to položaji z veliko družbene moči in ugleda, je bilo o njih tudi pogosteje poročano – kar rezultira v večji pojavnosti moških poklicnih poimenovanj v poročanju časopisov/revij. Ženska poklicna poimenovanja so se v splošnem pojavljala manj pogosto (v SP/Delu in GV, v NŽ so se pojavljala pogosteje kot moški poklicni nazivi) tudi zato, ker so bile ženske manj prisotne na trgu delovne sile in so zasedale sprva le ozek spekter poklicev. Večji obseg časopisnega poročanja o ženskah in bolj dosledna raba ženskih oblik pri naslavljanju žensk v različnih poklicnih vlogah sovpadata s postopno večjo prisotnostjo žensk na trgu delovne sile in obsežno prisotnostjo žensk na različnih (tudi tipično moških) delovnih področjih (90. leta prejšnjega stoletja; Mikić 2020). Na tem primeru lahko jasno vidimo medsebojno prepletenost in neločljivo povezanost jezika in družbe, pri čemer je jezik odraz potreb, ki so se pojavile na trgu dela (več žensk v različnih poklicih).

³⁶ Med te dejavnike štejemo tudi vrsto medija. Analiza je namreč pokazala, da so ženska poimenovanja pogostejša v specifični ženski reviji, medtem ko moška poklicna poimenovanja prevladujejo v poročanju o gospodarstvu in splošnem poročanju.

³⁷ Za podroben vpogled v politično-ekonomski kontekst glej Mikić (2020, 149–201).

Pričujoča analiza, ki je ponudila vpogled prakso zapisovanja poklicev v slovenskih časopisih/revijah v obdobju 1958–2018, je pokazala, da je imela največji vpliv na rabo (slovničnih) oblik poklicev jezikovna norma, ki je (in še vedno) postavljala moški slovnični spol v vlogo generičnega, in zato ustreznega za naslavljanje moških in žensk z le eno (moško) obliko. Čeprav je bila takšna raba jezika predpisana in v zgodnjih letih prejšnjega stoletja tudi nepreizpraševana oz. izpodbijana, jo vseeno razumemo kot seksistično prakso, saj je utemeljena na spolni hierarhiji, ki odraža in hkrati pomaga reproducirati (spolne) neenakosti v družbi. Po drugi strani pa opazamo rabo spolno specifičnega jezika, tj. rabe moške/ženske oblike pri naslavljanju tipično moških/ženskih poklicev, ki postavlja izjemo pravilu moške generične oblike, vendar le za primere, ko gre za stereotipno ujemanje poklica s spolom, kar je ponovno odraz seksizma v jeziku in ima (lahko) pomembne realne posledice. Če smo prej govorili o jeziku kot odrazu družbe in trga dela, lahko tu vidimo primer, kako jezik hkrati tudi vpliva tudi na ustvarjanje (predstav o) trga dela in odnosov med spoloma. S pojavljanjem npr. ženskih poklicnih poimenovanj samo v predominantno ženskih poklicih se namreč ustvarja podoba o ustreznosti (samo) žensk za feminizirane poklice, kar (lahko) omejuje možnosti, ki jih ženske (in moški) pridobijo na trgu delovne sile in pogloblja že obstoječe neenakosti v družbi.

Čeprav analiza poudarja prisotnost seksističnih praks pri zapisovanju poklicnih poimenovanj v časopisih/revijah, pa je treba omeniti tudi napredek, ki je viden v analizi in ki ga na splošno opazamo skozi čas. Moška generična oblika sicer ostaja prevladujoč način zapisovanja poklicev (zlasti v zaposlitvenih oglasih, za več glej Mikić 2021b), vendar se vzporedno odpira tudi prostor za vse več ženskih poimenovanj, ki se (odvisno od konteksta) v večji ali manjši meri uporabljajo dosledno (dosledna raba je navzoča predvsem, ko naslavljamo konkretne ženske z imenom in priimkom), kot je razvidno iz analize. Takšna raba jezika je rezultat (že omenjene) vedno večje prisotnosti žensk na trgu dela (in v najrazličnejših poklicih), kjer je bilo potrebno ustvariti jezik, ki bo ustrezno opisal/naslovil ženske, številnih (sprva) mednarodnih in (kasneje) slovenskih naporov, da se področje seksističnega jezika tudi bolj formalno uredi s predpisi, politikami, priporočili in smernicami, pa tudi javnih razprav, ki so vplivale na večjo splošno ozaveščenost o spremenljivosti jezika in škodljivosti nereflektirane rabe togih slovničnih pravil. Napredek je mogoče zaznati tudi v kontekstih najpogostejšega pojavljanja ženskih poklicnih poimenovanj, ki so se iz sprva tradicionalnih poklicev (1958, 1978) razširili na poklice, vezane na kulturo (1998) in gospodarstvo³⁸ (2018).

Predstavljena analiza ponuja vpogled v zgodovinske prakse rabe poklicnih poimenovanj in ima nekaj omejitev (omenjene v predstavitvi metodologije). Kljub temu pa ponuja dobro izhodišče za nadaljnje raziskovanje te teme, katero bi se lahko usmerilo v več smeri: na širjenje obsega medijev (še drugi časopisi/

³⁸ Pri letu 2018 je treba upoštevati, da je bil v analizo vključen le en medij – Delo.

revije, tudi spletni mediji in družbena omrežja) ali izbiro drugih virov raziskovanja (zaposlitveni oglasi, interni organizacijski akti, platforme), širjenje obsega jezikov in njihove medsebojne primerjave, uporabo korpusov (npr. Gigafida 2.0) za analizo pisne standardne slovenščine, širjenje analize na govorno slovenščino (npr. korpus Gos) ipd. Zanimivo bi bilo raziskati tudi načine, na katere lahko uporabimo umetno inteligenco pri raziskovanju poklicnih nazivov, bodisi vsebinsko (kako UI ustvarja poklicne oblike, na kakšen način reproducira spolne stereotipe, ko govori o poklicih ipd.) bodisi metodološko, kot orodje za analizo velikih besedilnih korpusov.

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SEXISM IN OCCUPATIONAL NAMING? ANALYSIS OF OCCUPATIONAL TITLES IN SLOVENIAN NEWSPAPERS AND MAGAZINES (1958–2018)

Abstract. *The purpose of this paper is to analyse the grammatical forms in which occupational titles appeared and, through the lens of feminist stylistics, to identify aspects of sexism in language. The analysis covers four points in time (1958, 1978, 1998, 2018) and focuses on three newspapers/magazines (Delo, Gospodarski vestnik, Naša žena). The findings indicate that the language was largely subject to sexism, as primarily reflected in the dominant use of the masculine grammatical form as generic and in the gender-specific use of language while referring to occupations. These practices reflect both established linguistic norms and gender stereotypes.*

Keywords: *language, gender, sexism, sexist language, occupations, occupational titles.*

RETHINKING SLOVENIA'S
EXCEPTIONALISM:
BEHIND, WITHIN AND BEYOND THE
NEOCORPORATIST FRAMEWORK

Marko HOČEVAR, Ana PODVRŠIČ*

EDITORIAL

Slovenia attracted considerable academic attention during the European enlargement process. Whether for its Yugoslav self-management past, social dialogue, involvement of the state in the economy, or relatively significant domestic factions of capital, the country has often been seen as an exception on the Eastern European periphery. The most influential conceptual tool for thinking about the characteristics and dynamics of capitalism's trajectory in Slovenia emerged from the second generation of comparative institutionalist debates, viewing Slovenia as a case of (exceptional) neocorporatism. Yet, the start of the 2008 global financial crisis saw most of the (claimed) achievements or the outlying characteristics of the Slovenian institutional set-up either vanish or be substantially attenuated and/or transformed: tripartite bargaining exists only as an institutional frame with limited content, the state has stepped back and left the European actors to decide on the key economic issues, while most of the domestically owned enterprises either went bankrupt or were sold to foreign capital.

Despite major transformations of the Slovenian state and economy in the last decade, there has been no major rethinking of the dominant conceptual tools. In fact, Slovenia has practically disappeared from politico-economic debates as a case study these days, with the small exception of studies on industrial relations. Still, one should not think that no research on the country's post-2008 crisis development has been produced recently. Quite a lively debate among domestic scholars can be found that offers fresh insights into the political, economic and institutional dynamics of Slovenia. This newer research has nevertheless hardly resonated in the international scholarly community. In fact, the neocorporatist framework generally continues to be the main perspective for understanding Slovenia, despite considerable advances in international and comparative political economy.

The thematic section entitled *Rethinking Slovenia's exceptionalism: Behind, within and beyond the neocorporatist framework* aims to 'liberate' Slovenia from being confined within an institutionalist neocorporatist *problématique* and return the country to the international research community's agenda. The section brings six articles together from diverse disciplinary backgrounds that not only rethink the changes, breaks and continuities in Slovenia's economic, social

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and political development, but also offer insights into its behind-the-scenes contradictory dynamics, while proposing new theoretical horizons for analysing the capitalist trajectory in Slovenia.

Ana Podvršič presents an overview of studies on Slovenia to understand why Slovenia has lost its analytical appeal as a research case study following the 2008 global financial crisis (GFC). She argues the country's initial heterodox development made Slovenia an attractive case study for exploring possible institutional alternatives to radical neoliberalisation. After the tripartite bargaining became exhausted as well as the significant post-GFC wave of privatisation, Slovenia lost its appeal among scholars concentrating on export-led economies dependent on foreign capital. In addition, while the debates today remain focused on questions of stability and continuity, Slovenia's more recent trajectory has been characterised by a prolonged economic and financial crisis and ongoing political instability.

The following three articles return to the discussions on Slovenia's neocorporatism but analyse its dynamics and contradictions from fresh theoretical angles. Considerably influenced by studies on (Slovenia's) industrial relations, the great majority of analyses of the country's neocorporatism under-theorised the crucial role of the state and political parties. Marko Hočevar highlights the thus far overlooked element in analysis of Slovenia's neocorporatism prior to the 2008 crisis. He focuses on the neocorporatist institutional arrangements and interests and goals of the dominant social bloc(s) in Slovenia. Strategic documents of the state are analysed since they were particular emanations of the interests and visions of the political-economic-bureaucracy and emerging-capitalist-class nexus, which were formed and adopted before the tripartite negotiations. His analysis shows that beyond the neocorporatist structure and certain neo-Keynesian policies as the outcome of the social partnership, a very strong orientation to implement greater liberalisation in the areas of employment and social policy was present well before 2004 or 2008.

Joachim Becker analyses the role of political parties in the rise, consolidation and contestation of neocorporatism in Slovenia and Austria. He argues that the type of connections between the political parties, on one hand, and the representatives of labour and capital, on the other, are strongly shaping the phase of erosion and contestation of neocorporatism. The firm links between business and the *Österreichische Volkspartei* slowed the erosion of neocorporatism in Austria. In Slovenia, however, no organic links developed between the parties and the representatives of labour and/or capital. Neocorporatism in Slovenia was consequently substantially more weakened, especially given the lack of links between parties and business organisations.

Maja Breznik and Majda Hrženjak analyse the crisis of the welfare state in Slovenia and its connections to the crisis of neocorporatism. They argue the two crises are interconnected and deeply embedded in the international system of national welfare provisions and transnational care inequalities. Since the early 1990s, greater private investment has been made in the country's welfare state,

with the expectation it would improve the quality of services. However, private capital has transformed the sector's operating logic, making it more profit-driven. The influence of the social partners, especially the trade unions, on the welfare state has thus faded considerably, at the same time as Slovenia (a semi-peripheral state) faces growing pressures toward the familisation of care driven by workforce shortages and the retrenchment of public services.

The last two contributions in the thematic bloc open new research avenues for studying the development of peripheral capitalism in Slovenia, moving behind and beyond the neocorporatist framework. The consideration of Slovenia as an Eastern European neocorporatist exception has often come with a normative appreciation of the country's transition having been "better, smoother, and socially equal". Nina Vodopivec goes behind such a positive macroeconomic generalisation to emphasise the everyday experiences of (female) workers. Her long-term ethnographic and historical research focuses in particular on the closure of the Mura textile factory, and traces how the material and symbolic impoverishment of the workers' experiences have been interpreted, silenced or delegitimised in public discourse. She argues the workers' loss represented a dis-possession, i.e., a form of structural violence that stripped them of their livelihoods, political agency, and the material foundations of their lives built during the time of self-management.

Jaša Veselinovič focuses on Slovenia's growth model, its export dependency, and the specific political and economic elite agency in attempting to balance between the country's EU and NATO membership and the importance of exporting to new markets. He shows that in recent years, even though this is a contested and contradictory process, Slovenia has shifted to greater collaboration with China and especially views it as a possible economic partner due to the struggles of the EU's, notably Germany's, industrial sector.

The political and economic developments, ruptures and changes over the last few decades have been very significant. The possible shift of the EU in the global division of labour, its economic stagnation and technological lag behind the USA and China, already entail changes in the institutional frameworks, political configurations and organisation of capital accumulation underpinning the development patterns of European countries. It is most likely that these changes will also reshape the power relations between different factions of labour, capital and the state, within and between the countries. The current dynamics of the capitalist economy along with the technological, economic and political shifts and continuities also require different theoretical frameworks for understanding how capitalism is evolving and transforming, notably in countries on the periphery that have always been put under greater pressure in times of crises. It is our hope that the following articles will trigger new discussions on ways to understand not simply the case of Slovenia, but also more broadly the development of peripheral capitalism.

Ana PODVRŠIČ*

SLOVENIA IN THE COMPARATIVE POLITICAL ECONOMY OF THE EASTERN EUROPEAN PERIPHERY: FROM RESEARCH LABORATORY TO MARGINALISATION**1

Abstract. The article provides a review of comparative political economy debates on the post-socialist trajectories of Central and Eastern European economies (CEEEs). Before the 2008 global financial crisis, studies focused on the institutional diversity of dependent capitalism in the CEEEs; post-crisis, scholars began to analyse the dependent character of CEEEs' macroeconomic structures. Besides discussing the analytical strengths and limitations of these debates, the article aims to understand why Slovenia, found in the centre of the initial debates, has largely disappeared from contemporary discussions. We argue this 'research trajectory' of Slovenia is related to the shifting (limits of the) dominant research designs and topics, along with the specific historical trajectory of capitalism in Slovenia before and after the 2008 crisis.

Keywords: comparative political economy, Central and Eastern Europe, Varieties of Capitalism, Growth Models Perspective, Slovenia, 2008 crisis.

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INTRODUCTION

Comparative political economy has a longstanding tradition in the social sciences and been grounded in multidisciplinary approaches from the outset. Its specific research agenda, however, has varied considerably: traditional scholarship, such as Marx, Durkheim and Weber, was concerned with defining the unique character and systemic features of capitalism as such; during the post-war period, studies focused on comparing capitalism with its historical “other”, i.e., socialist systems (Bohle and Greskovits 2009, 355–56; Chavance 2002). The Fall of the Berlin Wall nonetheless marked a turning point in the research agendas, which started to increasingly ‘compare capitalism with capitalism’. This article provides a review of comparative political economy debates on the post-socialist trajectories of Central and Eastern European economies (CEEEs). The debates studied here understand markets as socially embedded and historically determined, and primarily rely on qualitative methods. In the article, we examine the core assumptions of prevailing studies and analyse how these have addressed the case of Slovenia. Alongside discussing the analytical strengths and limits of these debates, the article seeks to understand why Slovenia, which was at the centre of the initial debates, has largely disappeared from contemporary discussions.

We argue that such a puzzling trajectory of Slovenia as a research case is related to the shifting (limits of the) dominant research designs and topics, as well as the country’s specific historical trajectory before and after the 2008 global financial crisis (GFC). The comparative scholarship evolved from studies on the institutional diversity of dependent capitalism in the CEEEs to the post-crisis debates on macroeconomic features and the centrality of exports and foreign capital for the countries’ economic performance. Slovenia’s initial heterodox approach of capitalist restoration and integration into the world market proved insightful for exploring the possibility and factors of alternative dependent development paths. However, with the shift to more casual neoliberalisation and subordination following the GFC, Slovenia lost its special research status. Its current marginalisation in the debates is also linked to the fact that comparative scholarship focuses on issues of stability and continuity; in contrast, Slovenia’s post-crisis trajectory was characterised by a prolonged economic and financial crisis, together with ongoing political instability.

The article follows the temporal development of the debates. The first two sections discuss the pre-crisis evolution of institutionalist studies, from firm-centred discussions to more encompassing politico-economic analyses of dependent capitalism in CEECs. The last section turns to the post-crisis macroeconomic debates on CEEEs’ growth models. We conclude by suggesting an alternative research agenda inspired by the Latin American dependency perspective.

THE PROLIFERATION OF 'MARKET ECONOMIES' IN THE EAST

The restoration of capitalism at the end of the last century occurred in the context of a significant shift in the history of economic thought (Chavance 2011). The rise of neoliberalism and anti-state interventionism in the 1980s contributed to the scholarly marginalisation of Keynesianism and reinforcement of neoclassical economic thought. The latter offered grounds for the ahistorical and theological transition doctrine according to which all socialist countries should as quickly as possible implement the same package of market reforms to move from point A, i.e., an 'inefficient planned economy', to point B, i.e., a 'fully-fledged market economy'. Soon, scholars from various fields began to criticise its finalist approach, highlighting the central role of institutions and the cross-country differences (Chavance 2011).

By the mid-2000s, studies that challenged the universal claim of the neo-classical paradigm had become increasingly framed within the Varieties of Capitalism (VoC) approach, introduced by Hall and Soskice (2001) in their influential "Varieties of Capitalism: Institutional Foundations of Comparative Advantage". To understand how institutions impact innovation capacities and economic performance, Hall and Soskice (2001) elaborated a medium-level analysis concentrated on firms' strategic responses to heightened competition. They considered the interaction of firms with the following five institutional spheres as being especially important: a) the financial system or market for corporate governance; b) the internal structures of the firm; c) industrial relations; d) the education and training system; and e) inter-company relations.

Based on the main way firms and other actors coordinate their endeavours, Hall and Soskice (2001) propose two ideal-type models. In a liberal market economy (LME), typically represented by the USA, enterprises rely mostly on flexible markets and price signals. This model promotes radical innovation and tends to excel in the domain of high-end technology. In contrast, in a coordinated market economy (CME), most clearly represented by Germany, collaboration and strategic interactions are crucial strategies of firms to face the competition. The comparative advantage of the CME model lies in the sector of capital goods, founded on incremental innovation. Institutions in both models are complementary to each other, meaning that one type of coordination in one sphere is efficient only when corresponding coordination prevails in other spheres. Since institutions are interdependent and complementary, as well as a source of firms' and countries' international competitiveness, these national models would continue to diversify amidst the (back then) intensifying globalisation.

Slovenia – together with Estonia – figured prominently in the 'eastward' expansion of the VoC. Both countries have many historical legacies in common: they were once part of larger federal structures, and each faced a hyperinflation situation and the collapse of traditional trade regimes in the early 1990s. Moreover, the two countries joined the EU in 2004, performed relatively well in

macroeconomic terms, and experienced growth rates above the average of the transition countries as a whole. Yet, Slovenia was known for its slow privatisation and gradual liberalisation, in contrast to Estonia which pursued quite radical (“big bang”) market reforms.

The initial studies identified Estonia and Slovenia as “antipodes”, i.e., representatives of the two ideal-models. In his analysis of industrial relations, Feldmann (2006) emphasises that “[t]he Slovenian model represents a consensual and coordinated approach to industrial relations and social dialogue, with strong employers’ organisations and unions, and also exceptionally high coverage of collective agreements. The countries most similar to it in this regard are probably Belgium, Austria, and Finland, archetypal CMEs” (Feldmann 2006, 841). Indeed, Slovenia was remarkable in its institutionalisation of a relatively developed, highly centralised, and inclusive collective bargaining system, together with an effective social protection system that prevented an increase in inequalities without undermining the economy’s competitiveness (Stanojević 2012). For Feldman, the CME emerged in Slovenia as a consequence of specific heritage and policy decisions: first, the experience of the Yugoslav self-management, encouraging coordination between decentralised enterprises and the participation of workers in companies’ decision-making; second, the adoption of a managed float currency regime which facilitated the coordination of wage increases by a centralised bargaining system; and third, the method of privatisation, which combined employee buyout with the free redistribution of vouchers to citizens and limited the participation of foreign capital.

Buchen (2007) complemented Feldman (2006) by studying five institutional subareas defined by Hall and Soskice (2001). He found that, on top of the corporatist-like industrial relations, the dual apprenticeship system and relatively generous welfare benefits make Slovenia comparable to Germany. In addition, “Slovenian trade figures reveal a comparative advantage in typical CME-s sectors, such as road vehicles, electric machinery and rubber manufacturing” (Buchen 2007, 81). There was, however, one aspect in which Slovenia and Germany differ importantly. In contrast to typical CMEs, the Slovenian corporate governance system was (in the 1990s) characterised by significant employee ownership and the strong influence of partly state-owned investment funds, which played the role of “a functional equivalent in the absence of proficient banks providing patient capital” (Buchen 2007, 85).

Here, Buchen (2007) raised an important point regarding the analytical weaknesses of the VoC. Built on the example of long-established capitalist economies, which dominated world markets, the latter is unable to grasp the institutional particularities of countries coming from the world (semi)periphery. “[A]ll, or nearly all, of the former state socialist countries, diverge from the advanced Western ones: they all have a higher level of state ownership and control of the economy and have serious deficiencies in the levels of internal sources of investments” (Lane 2005, 244–45). In fact, parallel to the studies that

transpose the dichotomist typology to post-socialist EU member states, some scholars have recognised the need to infuse greater complexity into the VoC.

The first attempts to overcome the parsimony of the VoC were mostly made in quantitative studies that compared a large(r) number of post-socialist economies, including non-EU candidate or member states, and expanded the range and scale of indicators considered (see Table 1) (Bluhm 2010). Such encompassing comparisons send a powerful message to all *TINA* proponents in the region: not only do low taxes, deregulated labour markets, and a 'lean' welfare state not automatically improve competitiveness and innovation, but "[t]he corporative model always shows better socio-economic variables, such as inequality, poverty, voice and accountability, freedom index, life expectancy" (Tridico 2011, 173). The Slovenian experience fully confirms this observation. According to Bembič (2019, 334), "there has been a close relationship between economic and social convergence in Slovenia, especially during the early periods of transition when, in the process of social dialogue, measures with a strong impact on economic convergence were exchanged for reforms leading to upward convergence in social standards".

Nevertheless, the initial 'eastward' transfer of the VoC led to the proliferation of typologies that often contradict each other and – *inter alia* – partly question the exceptionalism of the Slovenian case. Slovenia, for instance, appears as a representative of a developmental state (together with the Czech Republic and Hungary); of a corporative capitalism state (together with Hungary, Poland, Croatia, Macedonia, the Czech Republic); or a continental type of capitalism with a greater state role (together with the Czech Republic, Poland, Hungary, Slovakia and Estonia). Therefore, despite their contributions, the studies' confusing outcomes and proposed typologies indicate "serious theoretical problems that are hardly reflected in the attempts to adapt the VoC approach to Central and Eastern Europe" (Bluhm 2010, 200). Thus, we now turn to more critical engagements with the VoC and the conceptual solutions proposed by the second generation of comparative scholarship on CEEs.

Table 1: SLOVENIA IN VARIETIES OF CAPITALISM IN CEEES

Variety of capitalism	Group of countries resembling Slovenia	Other typologies and included countries	Indicators
Continental type of capitalism with a greater role for the state (Lane 2005)	Slovenia, Czech Republic, Poland, Hungary, Slovakia and Estonia	Hybrid state/market uncoordinated capitalism: Russia, Ukraine, Kazakhstan, Georgia, Turkmenistan and Moldova <i>Unclassified:</i> Uzbekistan, Belarus, Turkmenistan	Private ownership of assets, the presence of a free market and price liberalisation, the accumulation of capital, integration into the global economy, mechanisms of firm coordination, income redistribution and inequality
Developmental state (Cernat 2007)	Czech Republic, Hungary	Anglo-Saxon model: Estonia Developmental state: Poland, Bulgaria, Latvia, Lithuania	Collective bargaining system, state intervention, banking sector and financial institutions, the degree of internal institutional 'consistency'
Market economy with strategic coordination (Knell and Srholec 2007)	Belarus, Ukraine, Croatia, Bosnia and Herzegovina, Czech Republic, Uzbekistan, Romania	Market economy with (liberal) market coordination Poland, Serbia and Montenegro, Kazakhstan, Georgia, Armenia, Moldova, Slovakia, Hungary, Lithuania, Estonia, Kyrgyzstan <i>In between:</i> Bulgaria, Macedonia, Azerbaijan, Latvia	Coordination index: Social cohesion (GINI, tax rates, government final consumption expenditure), labour market regulations (World Bank criteria), business regulations (World Bank criteria)
Corporative capitalism (Tridico 2011)	<i>Pure models:</i> Hungary, Slovenia <i>With a hybrid tendency:</i> Poland <i>With a competitive tendency:</i> Croatia, Macedonia, Czech Republic	State capitalism: Turkmenistan, Belarus, Uzbekistan Hybrid capitalism: <i>Pure models:</i> Romania, Bulgaria <i>With a dirigiste tendency:</i> Bosnia and Herzegovina, Ukraine <i>Dirigiste capitalism:</i> <i>Pure models:</i> Azerbaijan, Kyrgyz Rep., Serbia, Moldova, Russia, Tajikistan, <i>With a corporative tendency:</i> Montenegro <i>Competitive capitalism:</i> <i>Pure models:</i> Estonia, Slovakia <i>With a dirigiste tendency:</i> Albania, Armenia, Georgia, Kazakhstan <i>With a corporative tendency:</i> Lithuania, Latvia	Indicators: enterprise and privatisation, market and competition, trade and openness, financial system, wage nexus and social investments Mixed sources of variables: EBRD, World Bank, and Freedom House

Source: The table was compiled by the author.

BEYOND APOLITICAL “CLOSED CONTAINERS”

Since its release, the original VoC framework has drawn extensive criticism. The second generation of comparative scholarship on CEECs particularly addresses the VoC's deterministic theory of institutions and methodological nationalism. In the following, we discuss four conceptual innovations, two 'from within' and two 'from without'. Crowley and Stanojević (2011) and Nölke and Vliegenthart (2009) consider that the mentioned limits of the VoC could be overcome within the fundamental analytical boundaries of the original approach by relaxing and/or adapting some of its premises. Myant and Drahokoupil (2011) and Bohle and Greskovits (2012), in contrast, develop alternative frames that account for the transnational and multi-scalar dimensions of the CEECs' economy and polity, as well as the inherently unstable or transformative character of institutional building.

Combining (Labour) Power and Struggles with the VoC

Crowley and Stanojević (2011) in particular address the firm-centred understanding of institutional change. Hall and Soskice (2001, 9) define institutions as systems of formal and informal rules that surround the activities of economic actors, facilitating their coordination and adjustment to the pressures of globalisation. Such a view underestimates the importance of (domestic) politics, social struggles, and class conflicts in shaping (inter)national institutional arrangements. Combining VoC with power source theory, Crowley and Stanojević (2011) stress that the formation of the CME in Slovenia followed an open conflict between representatives of labour, capital and the state in the initial phase of capitalist institution formation. “Without this wave of labour mobilisation, and the continued relative strength of unions in Slovenia, coordinated institutions would either not have emerged, or at the very least would have been considerably weaker and less established than they have been” (Crowley and Stanojević 2011, 269). Employers embraced centralised bargaining as a way to enforce wage restraint, but only when they were compelled to do so. They argue that the specific legacy of the Yugoslav self-management was an essential source of the strength of Slovenian labour. In addition, the timing of labour mobilisation, which overlapped with the forming of new capitalist institutions and the nation state, as well as the social-democratic leanings of the leading trade unions, were also crucial factors contributing to the formation of strong tripartite institutions.

Towards a New, Dependent, Market Economy

Building on the case study of the Visegrád countries, Nölke and Vliegenthart (2009) tackled the problem of methodological nationalism underlying the original VoC. For the latter, firms are supposed to resolve their coordination problems only within the limits of national institutions. National economic systems are considered hermetically “closed containers” without interaction from the outside and limited interaction inside. For Nölke and Vliegenthart (2009),

in contrast, the key institutional feature of CEEEs is their dependency on foreign direct investment (FDI). They consider that a new “variety of capitalism” emerged in CEEEs, a “dependent market economy (DME)”. The hierarchy within the multinationals (MNCs) and the relationships between headquarters and subsidiaries constitute the central coordination mechanism in a DME (in contrast to markets in LMEs and networks in CMEs). The main comparative advantage of a DME is a relatively cheap but skilled labour force, combined with medium-level technology. As a consequence, the position of employees is weaker than in a CME, and government spending on education is limited due to the (low) tax competition to attract FDI. Moreover, since MNCs tend to concentrate innovation-intensive activities in their headquarters, dependent market economies often serve as assembly platforms with limited innovation. Although a DME holds great potential for economic growth, its upgrading potential and long-term stability depend strongly on MNCs’ investment decisions and innovation strategies, whereby highly profitable and knowledge-intensive activities are concentrated in the headquarters. Since innovation (at best) occurs through technology transfer within MNCs’ firms with limited links to domestic companies, the DME innovation system is quite passive in character.

The contribution of Nölke and Vliegenthart (2009) is significant because their analysis provides the first coherent and parsimonious attempt to extend the VoC to a region of the world (semi)periphery (cf. Schedelik et al. 2020). Its analytical value in explaining the case of dependency in Slovenia is, however, limited (at least the trajectory prior to the crisis, see below). Yugoslav self-management enabled Slovenia to develop a number of domestic competitive manufacturers that have been important players in European markets since the 1970s (Lorenčič and Prinčič 2018). Moreover, a crucial feature of a DME is the foreign ownership of banks and few, if any, linkages between the (foreign-owned) corporate and banking sectors. In contrast, the heterodox approach adopted by the Slovenian state to banking restructuring in the 1990s supported the state-led recovery of domestic financial capital and domestic ownership of banks (Štiblar 2010; Lindstrom and Piroška 2007). Although the dependent character of post-Yugoslav capitalism in Slovenia is undisputed, the actual modalities and mechanisms of the country’s dependency cannot be grasped with the DME concept.

Varieties of Dependent Capitalism

Myant and Drahokoupil (2011; see also Drahokoupil and Myant 2015) considerably extend the dependent as well as conflictual and political dimensions in the analysis of the CEEEs. First, they view the dependent mode of international integration as being the most distinct feature of post-socialist economies. Instead of competing for a leading position in world markets based on innovation and a sectoral niche, the CEEEs had to find ways to earn foreign currency to pay for imported technology and resolve, albeit only temporarily, “the problem of financing the persistent current account deficits” (Myant and Drahokoupil

2011, 300). The neoliberal Washington Consensus paradigm, which framed the “transition strategies”, precluded any possibility of a recovery on a more self-sustaining basis (see also Ivanova 2007). Myant and Drahokoupil (2011) distinguish between types of dominant export commodities, the importance of remittances and foreign aid, and the role of foreign borrowing and financial inflows. According to them, financialisation “is the most difficult to fit into easy schematisations, playing some role for countries in all groups” in the run-up to the GFC (Myant and Drahokoupil 2012, 9). Second, Myant and Drahokoupil (2011) observe the CEEEs’ international integration is not only determined by institutional preconditions, but also by inherited economic structures, natural resource endowments, and geographical location. Third, the notion of institutional advantage should be adapted to encompass the contested character of property rights, the weak rule of law, and the different levels of the state’s relative autonomy from domestic capitalist groups. Finally, they allow for “the diversity within individual political economies and the role of contingency and politics” (Drahokoupil and Myant 2015, 159).

In other words, Myant and Drahokoupil (2011) build their “varieties” on the five forms of integration and their preconditions in terms of “state capacity (rule of law and the separation of business and politics), state activity (state policy), business development and the financial system” (Drahokoupil and Myant 2015, 159). They identify six varieties of capitalism, which – partly ambiguously – combine economic and political/state features: FDI-based complex manufacturing, peripheral market economies, order states, oligarchic or clientelist states, and remittance and aid-based economies (see Table 2).

Together with other Visegrád countries, Slovenia’s main distinctive feature is seen as its integration into an FDI-based complex manufacturing export network. Slovenia and, to a lesser extent, the Czech Republic, managed this integration without the major involvement of foreign investors. It is worth noting that although the figures presented by Myant and Drahokoupil (2011) show Slovenia experienced significant financialisation prior to the GFC, the authors do not pay particular attention to these dynamics. Instead, with respect to the CEEEs, they discuss only the Baltic states and Hungary, without mentioning Slovenia (Myant and Drahokoupil 2011, 207–310).

Table 2: FIVE VARIETIES OF “DEPENDENT-INTEGRATION” CAPITALISM

Type of capitalism	FDI-based	Peripheral market economies	Order states	Oligarchic and clientelist	Remittance- and aid-based
Form of integration	Complex manuf. with FDI	Subcontracted manufacturing	Complex manufacturing without FDI	Commodity including semi-manufacturing	Remittances
State capacity					
... Rule of law	Requires a stable environment for all business	Requires a stable environment for all business	Requires protection only for key enterprises	Requires protection only for key enterprises	No requirements
... Separation of business and politics	Separation of business from direct dependence on politics	Separation of business from direct dependence on politics	Close linking of key business and political power	Does not require independence of business from political power	No requirements
State activity	Creates infrastructure for the economy and support for FDI	Basic economic infrastructure	Can protect and help particular activities, substituting for the rule of law	Basic economic infrastructure	No requirements
Business development	The only limitation is that it does not require the development of new, innovative business	Requires independent business	No requirements	No requirements	No requirements
Financial system	Complex financial systems and capital markets are not important for FDI	Likely to require some independent sources of finance	The state can direct finance	Big business can seek state help and/or external finance	No requirements
Other Factors	Inherited (complex) industrial base	Cheap labour		Resource endowments	
Embeddedness	Industrial relations, labour markets and welfare systems are not important preconditions. Their development reflects internal social conditions and political forces.				

Source: Myant and Drahokupil 2015, 160, Table 91.

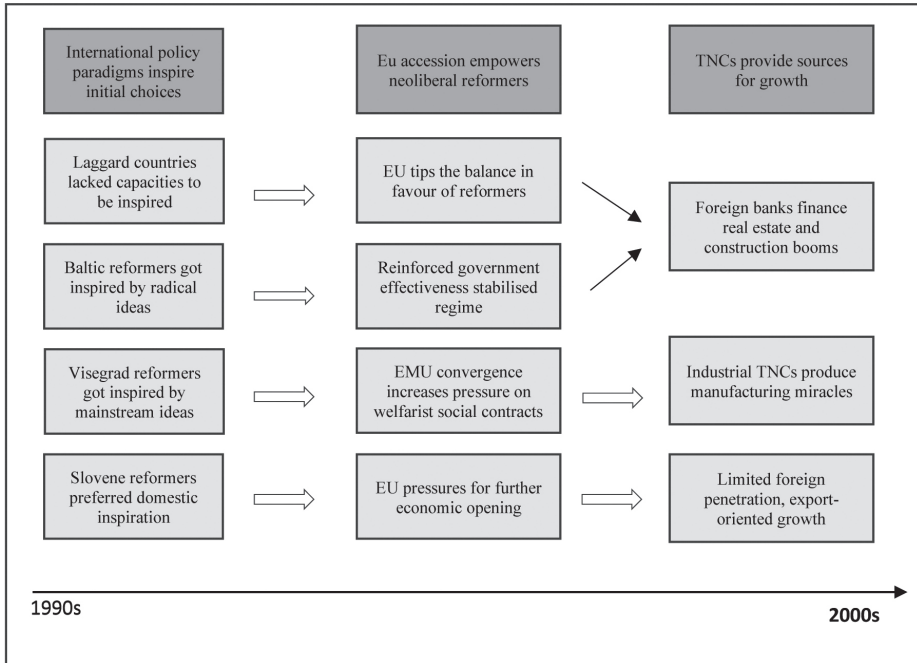
Politico-economic Regimes of Transnational Capitalism on the European Periphery

Compared to Myant and Drahokoupil (2011), Bohle and Greskovits (2012) place primary emphasis on political factors and agency. “Any meaningful conceptualization of the new configurations must [...] include propositions about transformative political agents and their interplay with transnational and supra-national actors” (Bohle and Greskovits 2012, 13). They rely on insights from Polanyi’s (2008) Great Transformation and make a terminological shift away from “national varieties” and prefer to talk about “national regimes”. According to them, “post-socialist regime(s)” are characterized by “(1) types of national political economies that while (2) deeply and variably integrated in the neoliberal global and European order, (3) tend to pursue marketization and transformation cost compensation with different amounts of vigor and in varied forms, and (4) politically govern the pursuit of these conflicting and contested social objectives in different ways and with varied effectiveness” (Bohle and Greskovits 2012, 20).

They identify three distinct “national regimes” of “transnational capitalism” on the Eastern European periphery: pure neoliberalism in the Baltic states, embedded neoliberalism in the Visegrád countries, and neocorporatism in Slovenia. “Uniquely in the post-socialist world, Slovenia exhibits all the attributes of Western European small states: economic openness, protective and efficiency-enhancing compensatory policies, macroeconomic stability, and governance by established democratic and neocorporatist institutions” (Bohle and Greskovits 2012, 182). Besides a gradual reform strategy and the maintenance of a comparatively stronger welfare state, a selective approach to FDI, domestic ownership of banks, as well as collective bargaining agreements and social pacts, enabled “the balanced pursuit of an inclusive transformation strategy” (Bohle and Greskovits 2012, 24).

Bohle and Greskovits (2012) note that the Slovenian neocorporatism began to show signs of “destabilisation” and “disorganisation” in the mid-2000s. The election of a government led by the Slovenian Democratic Party (SDS) in 2004 marked the start of an era of political contestation, polarisation, and increased conflicts between institutionalised social partners (see also Stanojević and Krašovec 2011; Stanojević 2014; Fink-Hafner 2020). The first SDS government also allegedly enabled a neoliberal breakthrough in the economic strategy, including the abolition of mandatory membership in the Chamber of Commerce and Industry (Stanojević 2012, 871). The government change was all the more significant as it overlapped with broader trends for the erosion of neocorporatism under the rising pressures of (European) neoliberalisation and the internationalisation of production. As a consequence, when the global financial crisis erupted, neocorporatism, as a mechanism for policy bargaining and coordination, was significantly weakened (Bohle and Greskovits 2012, 250).

Figure 1: INTERNATIONAL INFLUENCES IN “POSTSOCIALIST REGIME FORMATION” ACCORDING TO BOHLE AND GRESKOVITS (2012)



Source: Bohle and Greskovits 2012, 94.

Bohle and Greskovits (2012) provide a rich comparative analysis of Slovenian economic, political and institutional dynamics. Their analysis is especially valuable since the mentioned dynamics are contrasted with developments in other countries from ex-Yugoslavia and Southeastern Europe. Even though their analysis is insightful in terms of the progressive transformation and destabilisation of tripartite arrangements, it provides only a partial understanding of Slovenia’s changing state structures, economic dependency, and crisis vulnerability. The authors (2012) relate the uniqueness of Slovenian tripartite governance and the strategy of upgrading the export industry with limited FDI to “superior state capacity” (2012, 202). Despite their (multi-level) state-oriented analysis, they do not discuss the eurozone and the impacts of the loss of monetary sovereignty on the Slovenian state’s policymaking capacities (see Image 1). This is somewhat surprising because they find that during the transition “in Slovenia monetary policy was meant to contribute to broader social and economic goals, and thus became embedded in a web of coordinated policymaking” (Bohle and Greskovits 2012, 212). Like Myant and Drahokoupil (2011), they only briefly discuss the importance and particularities of external debt-building in Slovenia in the 2000s (Bohle and Greskovits 2012, 249).

The second generation of comparative institutionalism successfully has raised the importance of the trade unions and export manufacturing in shaping Slovenia's trajectory of dependent capitalist expansion. However, their attempts to consider multi-scalar and international dimensions in the development of European dependent capitalism have remained limited, notably in the case of Slovenia.

DIVERGENCE OF RESEARCH AGENDAS AND SLOVENIA'S MARGINALISATION AFTER THE 2008 CRISIS

The outbreak of the 2008 GFC powerfully demonstrated the weaknesses of the original VoC, which conceived national models as independent and static. With respect to the CEEEs, the crisis clearly revealed the dependent character of the restored capitalism in the region. Further, Estonia and Slovenia, both considered some sort of "success stories", proved highly vulnerable. In 2009, Estonia's GDP dropped by almost 15%; in that year, Slovenia, whose GDP contracted by over 7%, was the hardest hit eurozone member state. In addition, Latvia, Romania, Serbia, Bosnia and Hungary were the first to receive the punishing financial assistance provided by the European Commission and the IMF (Becker 2013). Slovenia managed to escape the direct intervention of the European Central Bank, the Commission, and the IMF (Hočevar 2024b). Still, its post-crisis trajectory was far from "exceptional" and "alternative".

Given these developments, comparative scholars increasingly embrace a novel, so-called growth model (GM) perspective. The latter was elaborated by Baccaro and Pontusson (2016), who criticised the VoC for neglecting macroeconomic dynamics and factors such as unemployment and inflation. Building on insights from post-Keynesian and neo-Kaleckian macroeconomics, they propose analysing how differences in aggregate demand and related distributional conflicts impact countries' competitiveness and divergence of national trajectories. A core distinction is made between export-led and (debt-financed) consumption-led growth models, typically represented by Germany and the USA/UK, respectively. These two models can be further differentiated depending, among others, on the roles of credit and wage increases in financing domestic consumption, as well as the country's position in the global market hierarchy. In contrast to the VoC, the GM perspective considers the global economy "as a single but highly asymmetric field of power" (Baccaro et al. 2022, 24) and distinguishes core from peripheral growth models. Their long-term stability depends primarily on political factors, specifically the "growth coalition" (cross-class and cross-sector coalitions of dominant economic actors) and the capacities of political parties, which form part of the growth coalition, to gain electoral support (Baccaro and Blyth 2022).

Ban and Adascalitei (2022) were among the first to systematically apply the GM perspective to CEEEs. They consider that the region is characterised by specific macroeconomic features, i.e., an FDI-based export-led growth model. "While in the early 1990s only former Czechoslovakia and Hungary could boast

a share of exports in GDP close to Germany, 30 years later they were joined by Poland, Slovenia, and Bulgaria in increasing the share of exports in GDP above German levels, in some cases nearly doubling it [...] Slovakia, Hungary, Estonia, Lithuania, Slovenia, and Czechia grew to have over 80% of GDP from exports (up from less than half in the early 1990s)” (Ban and Adascalitei 2022, 196). For Ban and Adascalitei (2022), the forming of FDI-export led GM was related to the specific historical interplay of external factors (such as, rising Asian competition, geographical proximity with North Western, especially German, export-oriented production networks looking for new/cheaper production places) and the internal dynamics of the CEEEs (such as the scarcity of domestic competitive capital, pro-FDI-oriented domestic governments, deregulated labour markets, low corporate tax rates). Their analysis reveals the export reliance was strongly associated with the systematic suppression of wages and related redistribution of gains from economic growth to capital and/or state groups. Slovenian workers, notwithstanding the inclusion of their representatives in policymaking, did not escape this pattern – a fact also partly linked to the contradictions and limits of the trade unions’ strategy of social partnership (Breznik and Mance 2020; Stanojević 2015). After the GFC, together with Hungary and Croatia, Slovenia was the only country from Central and Southeastern Europe “where real wages largely stagnated, [other] states had real wage increases between 200 and 400 percent higher than the EU average” (Ban and Adascalitei 2020, 29, see also the figures, 33–34). In recent years, the weaknesses of the “FDI-based export-led model” have become ever more apparent. “[C]apital from core countries could move Eastward based on promises of wage moderation but workers from the East could also move Westward unsatisfied by the consequences of a shrinking wage share” (Ban and Adascalitei 2022, 191).

Contemporary studies on CEEEs have focused especially on the factors and mechanisms underpinning the ongoing stability and resilience of the “FDI-export-led growth model”. “For all the ‘nationalist’ rhetoric spreading in some Eastern countries, [the GM’s] fundamentals remain in place and are set to prevent convergence with ‘core’ Europe and lock in a middle-income trap instead” (Ban and Adascalitei 2022, 191). For some, this resilience is linked to the strategic interdependence between governments and leading capital groups (Bohle and Regan 2021). Attracting FDI has meant more than deregulating labour markets and introducing low corporate taxes. Instead, the CEEEs’ governments have elaborated a comprehensive FDI-oriented state-led industrial policy based on various investment support, especially in the form of tax incentives (tax breaks, tax holidays, capital allowances for intangible assets, and cash subsidies) (cf. Drahokoupil 2008). Particularly in times of crisis, MNCs strongly depend on the various state incentives to secure their competitiveness and profits. “As long as governments credibly commit to sustaining and sponsoring their business interests, they are not likely to care whether it is a liberal, conservative, or competitive authoritarian regime” (Bohle and Regan 2021, 99).

Other studies, however, emphasise the significance of various EU instruments in promoting FDI and export dependency in the CEEEs. In fact, Kohler and Stockhammer (2021) find out that after the GFC, price competitiveness has not played an important role in boosting the exports of the CEEEs. Their competitiveness has mostly relied on quality upgrading. As they emphasise, “[t]his calls for a shift in attention from labour market institutions and wage coordination toward the institutional and political determinants of productivity and economic complexity” (Kohler and Stockhammer 2021, 1336). The state aid mechanism has been especially instrumental in helping CEEEs’ governments in their fierce competition to attract FDI (Vukov 2020). Since most regions in the CEEEs are considered “underdeveloped”, governments can provide generous support to foreign capital under state aid restrictions due to the higher aid ceilings for less developed regions. At the same time, following the GFC, EU structural funds have been growing steadily and started to replace FDI inflows as the most important source of finance (Bohle 2018, 247). “Throughout their two decades of EU membership, the size of EU funds has become comparable to FDI inflows and remittances in the V4 and Baltic regions” (Medve-Bálint and Szabó 2024, 9).

It is perhaps not surprising that after the GFC the GM soon became the dominant analytical lens in the field of comparative political economy. In contrast to the VoC’s exclusive focus on firms’ competitiveness and related institutional configurations, the GM perspective brings forward macroeconomic structural variables. Moreover, it relates the specific configurations of aggregate demand to institutions and politics rather than just supply-side factors, and consider systemic instability. The GM perspective allows, in principle, for the conceptualisation and analysis of conflicts, instability and crisis, and their impacts on historically grounded national trajectories of capitalist expansion (for a more critical assessment, see Amable 2023). It is, however, an open question as to what extent this analytical potential has been fully explored in the scholarship on CEEEs. Avlijaš et al. (2023, 9) warn against the biases in the current research: “Based on a few macroeconomic indicators rather than in-depth country cases”, the present debate suggests, “that every economy in the region has been following the same trajectory”, and goes, in this respect, against the findings/contributions of the previous institutionalist debate.

Indeed, any more systematic discussion of the diverging economic structures and post-crisis restructuring of industrialisation and financialisation is largely missing from current analyses. Even more importantly, the consideration of (changing) macroeconomic dynamics with the current GM analyses is limited since this approach tends to “neglect the unstable nature of financial growth drivers, effectively ignore fiscal policy, and overemphasize price competitiveness as a growth driver” (Kohler and Stockhammer 2021, 1316). For instance, while after the GFC the current accounts of many deficit countries, such as the Baltic states, improved, this stabilisation did not result from improved export performance and any genuine industrial upgrading, but from slashed imports in

the context of weak aggregate demand and austerity (Kohler and Stockhammer 2021, 1325; cf. Medve-Bálint and Szabó 2024).

Also in the indebted Slovenia, the lion's share of the accumulation of the current account surplus during the crisis (2009–2013) was not provided by exports but by the collapse of domestic demand and the shifting of the burden of the crisis onto labour and public services (Bole 2016; Drenovec 2015). In fact, the crisis undermined the pillars of the expansion of domestic capital and considerably discredited the 'national capitalism' project. Under the constraints of the eurozone and pressures of financial markets, state leaders abandoned economic heterodoxy and, in quite a technocratic manner, aligned with external demands to introduce greater neoliberal reforms (cf. Stanojević et al. 2016). During a significant wave of foreign-led privatisation and takeovers, including in the banking sector, Slovenia's dependent economic structures actually began to ever more resemble the above-described DME model (cf. Becker and Podvršič 2024). Thus, the post-GFC export boom was based on a substantially different economic structures of dependency compared to the pre-crisis one.

Yet, the experience of Slovenia is generally missing from the current accounts in the GM perspective (for a partial exception, see Hočevar 2024a). The country, as a research case study, actually experienced a significant 'fall from grace' in politico-economic comparative debates. This scholarly marginalisation may be partly attributed to the shifting research designs in the period when Slovenia moved away from (the pre-crisis) heterodoxy to embrace more 'mainstream' neoliberal subordination post-crisis. After the GFC, Poland and Hungary became the leading countries in policy experimentation and (selective) economic nationalism. The economic strategy and restructuring under the nationalist parties have received considerable attention from scholars working on the re-emergence of the national-conservative paradigm within the rising far-right (for instance, Dąbrowska et al. 2018; Becker 2024). Despite several similarities between the already mentioned Slovenian Democratic Party and Fidesz and PiS, these parties diverge significantly in terms of their economic strategy and (capital) class alliances (Podvršič 2023).

However, the practical absence of the Slovenian case from current debates also indicates the limits of the dominant research agenda. Irrespective of having shifted from a supply- to a demand-side perspective, the dominant comparative scholarship on GM remains focused on the questions of stability and resilience of national trajectories, in a similar vein to the VoC. As explained by Medve-Bálint and Éltető (2024, 877–88), the VoC "attributes stability to the institutional architecture of capitalist systems, while the theory of business power sees the interactions between corporate and state elites as the foundation of systemic stability [...] the growth model perspective [...] outlines a similar argument by identifying social blocs as the supporting element of a growth model [...]" After the outbreak of GFC, for many years Slovenia barely resembled any "growth model". Instead, one could say the country's trajectory was more the case of a

“model in crisis” (cf. Podvršič 2023). Yet, a theory of crisis and politico-economic transformation is missing from the current design of the GM perspective. In this regard, the mentioned perspective only partly overcomes the analytical limits and weaknesses of its predecessor, the VoC.

Accordingly, Slovenia’s post-crisis trajectory has chiefly been discussed by scholarship that has continued to work on the issues of (post-crisis) institutional change and continuity. The outbreak of the GFC gave an excellent opportunity to test one of the core assumptions of comparative institutionalism, i.e., that national “varieties” only change as an outcome of external shocks or crises. “[T]o explore the extent to which institutions have structured crisis responses and whether the institutions themselves remained stable in the face of the crisis” (Feldmann 2017, 86), the studies build on the already established view of Slovenia and Estonia as institutional antipodes. Despite their different institutional set-ups, both countries accumulated significant foreign debt, were hit hard by the crisis, and constrained by the eurozone regulations. Scholars nonetheless find that the crisis did not significantly impact Estonia’s “laissez-faire” approach, whereas in Slovenia, important changes began to appear (Lindstrom 2015; Feldmann 2017). The cases of Slovenia and Estonia therefore provide strong evidence against any mechanism-based argument on institutional change as a consequence of an alleged external shock. Whereas no major transformation occurred in Estonia, the change in Slovenia’s corporatist model could be observed as incremental, happening on different levels at different paces and different times (cf. Stanojević 2012).

The latter point has been elaborated by scholars discussing the transformation of Slovenian corporatism after the crisis. These studies point to the “uncertain future” or “demise” of “Slovenian exceptionalism” (Crowley and Stanojević 2011; Guardiancich 2012; Stanojević 2012; Feldmann 2014), which found itself “at a crossroads” (Stanojević et al. 2016). Several factors have been discussed, such as the disintegration of the initial corporatist coalition, linked to the disintegration of the Liberal Democracy of Slovenia party; structural change in the economy with a rising number of transnationalised small and medium enterprises (Feldmann 2014); altered interests of the domestic bourgeoisie (Bembič 2017); weakening of trade unions during de-unionisation, fragmentation, and a strategic reorientation towards economic unionism (Breznik and Mance 2020); and a partial move towards re-regulation of industrial relations as part of the rebalancing of political power relations (Hočevár 2024b). While the social dialogue was revived following the GFC, its impact on social convergence is no longer clear (Bembič 2019).

It is worth mentioning that the institutionalist perspective on post-GFC divergences and similarities has also been employed by scholars interested in the particularities of dependent capitalism in Southeastern Europe (Delteil 2018; Magnin and Nenovsky 2021). These studies establish that both economically (dependence on multiple external economic sources (FDI, remittances, EU

structural funds)) and politically (states' weaker relative autonomy, dependent monetary regimes), Southeastern European countries exhibit greater dependence on core states and external representatives of capital compared to the CEEEs.

INSTEAD OF A CONCLUSION: DEEPENING UNDERSTANDING OF THE VARIOUS "SITUATIONS OF DEPENDENCY"

The "eastward expansion" of the VoC approach proved to be especially fertile in developing the research by questioning two of the original framework's core limitations, i.e., institutional determinism and methodological nationalism. A move away from institutionalist debates to the macroeconomic studies on the centrality of foreign capital and exports in CEEEs helped highlight certain previously neglected issues, such as the systematic underpayment of labour and wage moderation, which underpin the development of peripheral capitalism in the region. Nevertheless, this came at the price of downplaying important political, institutional and economic variations between the countries in the region.

As far as Slovenia is concerned, the country received substantial attention at the outset of the debates. The VoC approach puts industrial relations at the core of the framework for explaining capitalist diversity. Among CEEEs, Slovenia undoubtedly stood out with the institutionalisation of its relatively robust tripartite bargaining structures, a fact mainly caused by its special position within the relatively exceptional socialist Yugoslavia. The country was actually often (partly naively) used as an example of a possible and viable capitalist-alternative-with-a-human-face to the straightforward neoliberalisation and subordination. This 'exceptionalist view' of Slovenia was challenged not merely by the outbreak of the GFC, but by the GM perspective studies, which show great macroeconomic similarities between Slovenia and other CEEEs, along with a shared pattern of unequal redistribution of the gains of export reconversion in favour of capital (and the state).

Still, the actual mechanisms and patterns of the Slovenian economy's pre- and post-GFK restructuring require further examination. Whereas one can find substantial literature on the emergence, dynamics and viability of neocorporatism in Slovenia, the country's changing international integration, dependency, and related accumulation regimes have only been marginally discussed. Despite considerable debate on the mechanism and sources of dependency in CEEEs, a need remains to refine our understanding of the peculiar (national) "situations" and "mechanisms" of dependency (cf. Palestini and Madariaga 2021), especially in connection with the rapidly changing geopolitics. Some authors have already started to warn not to "throw out the baby with the bathwater when incorporating insights from the Growth Model Perspective in the institutionalist Comparative Capitalism framework. Instead of juxtaposing the two perspectives, we should synthesise the two" (Schedelik et al. 2020, 322). Another possibility for studying the changing dependency on the European periphery is to draw inspiration from

older perspectives on social transformations on the world's peripheries, such as those of the Latin American *dependentistas* (Arinci et al. 2015; Becker et al. 2021; for other theoretical avenues combining dependency with political regime theory, see Bohle et al. 2022).

Such a research perspective would have the advantage of studying the European periphery via the lens of a perspective that departed from the economic and social problems of peripheral, post-colonial economies; instead of building on frameworks developed on cases of the core countries (Arinci et al. 2015). *Dependentistas* developed a flexible methodological approach for studying peripheral “society, its structures and processes of change” (Cardoso and Faletto 1979) from a “historical-structural” perspective, which considers the changing interplay of “internal” and “external” factors, actors, and dynamics. In addition, whereas in the dominant approaches the dependent character of restored capitalism in the CEEs appears as a logical outcome of the challenges of competition faced by firms or national economies, *dependentistas* consider dependency as being strongly linked to the specific, capitalist mode of production and social relations (Weissenbacher 2019). In other words, *dependentistas*' holistic and integral approach studies dependency “from the (peripheral) inside out” by moving from local institutions, actors, power struggles and class dynamics to the structures of world capitalism and imperialism (Palestini and Madariaga 2021).

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SLOVENIJA V PRIMERJALNI POLITIČNI EKONOMIJI O VZHODNOEVROPSKI PERIFERIJ: OD RAZISKOVALNEGA LABORATORIJA DO MARGINALIZACIJE

Povzetek. V članku ponujamo pregled primerjalnih razprav na področju politične ekonomije o postsocialističnih gospodarstvih iz srednje in vzhodne Evrope (SVE). Pred svetovno finančno krizo leta 2008 so se analize osredinile na institucionalno raznolikost odvisnega kapitalizma v SVE; po krizi so raziskovalci začeli analizirati odvisne makroekonomske značilnosti gospodarstev SVE. V članku analiziramo prednosti in pomanjkljivosti prevladujočih pristopov in raziskujemo, zakaj je primer Slovenije, ki je bil v središču začetnih razprav, praktično izginil iz današnjih razprav. Ugotavljamo, da je ta »raziskovalna pot« Slovenije povezana tako s spreminjajočimi se problematikami (in omejitvami) prevladujočih pristopov kot tudi s samim zgodovinskim razvojem kapitalizma v Sloveniji pred krizo leta 2008 in po njej.

Ključni pojmi: primerjalna politična ekonomija, srednja in vzhodna Evropa, različice kapitalizma, pristop o modelih rasti, Slovenija, kriza leta 2008.

Marko HOČEVAR*

GRADUALIST KEYNESIANISM OR DESIRED LIBERALISATION? ANALYSIS OF STRATEGIC DOCUMENTS OF THE STATE, AND THE CONTRADICTIONS OF NEO-CORPORATISM IN SLOVENIA (1991–2008)**¹

Abstract. The article contributes to discussions on the nature, extent and depth of neo-corporatist political arrangements in Slovenia before the 2008 crisis by analysing the interests held by the respective dominant social bloc(s) as they emerged in the early 1990s and are most clearly expressed in strategic documents of the state. Our analysis shows that beneath the neo-corporatist structure and certain neo-Keynesian policies as the outcome of the social partnership, a strong technocratic, political and capitalist orientation to introduce greater liberalisation in the areas of employment and social policy was already present long before 2004, a year usually seen as when the neo-corporatist consensus started to crumble after a new right-wing government came to power and Slovenia joined the EU and NATO.

Keywords: Slovenia, neocorporatism, state strategies, capitalism, social bloc.

INTRODUCTION

The typical explanation of Slovenia's politico-economic development path before 2008 and the economic and financial crisis refers to several interconnected elements. Slovenia was able to both avoid a protracted war after it seceded from Yugoslavia and restore economic stability and growth by the mid-1990s,

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parallel to addressing social problems with important pro-social measures as adopted and implemented by successive governments. Established in 1994, the Economic and Social Council (ESC) not merely gave the trade unions a seat at the policymaking table, but they were able to push through vital legislation on social and labour protection. Despite the process of joining the EU causing some imbalances and pushing the country to adopt more liberalisation measures, the overall picture of Slovenia and its political, economic and social development was not altered. Most studies assume that the development path being followed by Slovenia was in troubled waters only in 2004 when it became a member of the EU and the Single Market's associated structural competitive pressures coincided with the first term in office of the neoliberal right-wing government, which advocated radical neoliberal policies, while the global financial crisis brought an end to that path (Fink-Hafner 2024; Hočevar 2020; Bembič 2018; Stanojević and Krašovec 2011, 2022; Stanojević 2014).

This led researchers to theoretically position analyses of Slovenia's transition within three frameworks: in the Varieties of Capitalism (VoC) framework, Slovenia was discussed as an example of a coordinated market economy (CME) (Feldman 2006, 2007; Crowley and Stanojević, 2011; Stanojević et al., 2016); those adopting a neo-Polanyian and institutional approach regarded Slovenia as a clear example of neo-corporatism (Bohle and Greskovits 2007; Bohle and Greskovits 2011; Stanojević 2012; Guardiancich 2012, 2016); and related to both the power resources approach firmly stressed the importance of trade unions as the crucial element for either a CME or neo-corporatism in Slovenia (Lukšič 1997; Lukšič 1998; Stanojević and Krašovec 2011; Crowley and Stanojević 2011; Stanojević 2012; Bembič 2018, 2023).

Emphasis in this article is on analysing hitherto overlooked strategic documents of the state that established the decisive ideational framework for national policymaking, and expressed the interests of the dominant social bloc during the transition period and before the crisis began in 2008. Analysis of the previously neglected element of the political and economic processes is accompanied by reflections on the interests held by the dominant social bloc as revealed in the strategic documents of the state, which provided the basis for further consultations between the social partners.

The article addresses two questions: 1) Which policies and policy frameworks were proposed in strategic documents of the state concerning the fields of employment, labour market and social policy? 2) How were these policy proposals related to the interests of the dominant social bloc in Slovenia during different periods prior to 2008? In the search for answers to these questions, the article contributes to the research on the Slovenia's particular transition by stressing a completely overlooked aspect – the strategic documents produced by the state between 1991 and 2008, and the interests of respective dominant social blocs reflected in them. The second important contribution is theoretical – the article highlights the importance of social blocs that created the ideational framework

and political agenda before they entered the policymaking arena with the trade unions.

The article has the following structure. After the introduction, we briefly review the main theoretical assumptions of the article and explain the concepts of the capitalist state, social bloc, and hegemonic project. We then focus on the central political, economic and social actors in Slovenia's transition along with an outline of the composition of various social blocs and their associated interests and goals. The fourth section briefly describes the main employment, labour market and social policies and their reforms between 1991 and 2008. The fifth section contains the methodological explanations of our analysis. The sixth section provides analysis of the main employment, labour market, and social policy recommendations in four key state strategic documents issued between 1991 and 2008. In the discussion, we consider the relationship between the dominant social bloc and specific policies in the setting of various conflicting and overlapping interests, as well as the implementation of employment and labour market policies. In the conclusion, we summarise our arguments and point to the significance of the research for understanding economic and social policy reforms in Slovenia after the global financial crisis.

THEORETICAL FRAMEWORK – THE CAPITALIST STATE AND THE SOCIAL BLOC PERSPECTIVE

Relatively functionalist reductionism seems to prevail within the political economy of comparative capitalism studies, and especially the VoC school, where in a pluralist/neo-pluralist sense it is assumed that trade unions and capitalists enter the arena for social dialogue as almost equal actors and the state is primarily the negotiator between them, and later the enforcer of the policies adopted. The role of the state is to focus on the economy functioning optimally with respect to supply and demand, and to align the interests, goals and institutions with the comparative advantages of a given economy (for the original argument, see: Hall and Soskice 2001; for a critique, see: Streeck 2010a, 2010b, 2010c; Baccaro and Howell 2011).

Nevertheless, the state and state actors in capitalist societies are not devoted to some predetermined functionalism and harmony, but always hold a relatively autonomous position vis-à-vis the various classes, while always being reliant on class power relations. As Poulantzas (2001, 129) noted, the state is “the *specific material condensation* of a relationship of forces among classes and class fractions”. Since the existence of the capitalist state depends on the reproduction of capitalist relations and the value form, there is an inherent strategic selectivity of state institutions (Jessop 1982, 2002; Offe 1974) according to which policy options are put on the agenda by state actors, while being especially influenced by certain political and class alliances and coalitions (Gramsci 1977; Jessop 2002; Baccaro and Pontusson 2016; May et al. 2024).

For a politico-economic development project to be stable (Jessop 2002), it is

necessary for a specific social bloc to be formed that, due to the strategic selectivity of the capitalist state and limited policy options available with the capitalist mode of production, typically consists of different elements of the political bureaucracy and different factions of the capitalist class (Swenson 1991; Culpepper 2010; Culpepper 2015; Baccaro and Pontusson 2016; Amable 2017; Bohle and Regan 2021). The dominant social bloc pursues what is in the interest of reproducing capitalism and the narrower class interests of the capitalist class (factions). If and when this social bloc also forms some sort of cross-class alliances in order to stabilise its politico-economic project, the project becomes truly hegemonic and one can then speak of a hegemonic bloc (May et al. 2024).

Actors who make up the dominant social bloc hold the capacity to influence the agenda-setting and narrow/widen the policy options for resolving given policy issues in order to reproduce suitable material conditions for capitalist production. While these can sometimes be broadened or altered, the extent to which this happens depends especially on the strength, resources and mobilising capacity of the working class and trade unions. One should thus note that not only are the precise policies the outcome of the different class forces in the capital-labour-state triangle as part of the different social dialogue arrangements in various contexts, but so too are the policy options and policy alternatives presented by the government in accordance with actors establishing the dominant social bloc who seek varying levels of support from subordinate classes and groups in order to stabilise their power and assert their interests. Moreover, relative autonomy of the state and state actors always exists vis-à-vis different classes and class fractions, in particular to block policy options that are too radical which come from either the side of capitalists or labour, or to prevent the interests of capitalists becoming too excessive, which could destabilise the reproduction of capitalist relations, or to block policy proposals that are too radical and anti-capitalist.

CAPITALIST RESTORATION AND CLASS RELATIONS IN SLOVENIA

The main players (political, economic) in Slovenia's transition held overlapping and diverging political and economic interests, and established odd alliances. First, on the political level, although Demos – a right-wing and liberal pre-election coalition of parties – won the first elections in 1990, it soon disintegrated as a result of different visions for the privatisation process. This created an opportunity for the Liberal Democracy of Slovenia (LDS) – a party formed from the ashes of the former Youth organisation of the League of Communists of Slovenia – to take power, while one of the last presidents of the presidency of Yugoslavia, Janez Drnovšek – who also became the president of the LDS, became the prime minister for over a decade. LDS remained the strongest governmental party up until 2004. On the other hand, Milan Kučan, the president of the Socialist Republic of Slovenia and former head of the Central Committee of the League of Communists of Slovenia, was the president of Slovenia up until

2002 when Drnovšek took over that office. From 1992 until 2004, LDS formed broad coalitions with conservative parties and also with the social democrats. An important break in political continuity in Slovenia came in 2004 when the Slovenian Democratic Party (SDS) won the elections and a right-wing government was formed. Even though it initially had a quite radical neoliberal programme, in the end it only managed to implement a fraction of the intended policies² (Hočevar 2024, 2025; Fink-Hafner 2024).

Second, while employers became organised in their representative organisations, strong continuity with the old regime can also be seen. Namely, most CEOs had either already been CEOs during socialism or held some other political/economic position. Their interest was chiefly to obtain enough funds to secure ownership of the formerly socially owned enterprises and to block any massive entrance of foreign direct investment (FDI), since foreign companies would outcompete them in the privatisation processes. This meant they were prepared to enter into alliances with the strong trade unions, while there was always a close association with the governing political groups that controlled the privatisation processes through legislation and the state funds. The employers' associations became more proactive and aggressive in fostering the interests of managers/owners after 2004 when membership in the Chamber of Commerce and Industry was no longer compulsory, which also meant it had to promote the direct interests of its members in order not to lose them (Stanojević 2012; Hočevar 2024).

Third, the presence of strong trade unions had a very important impact on the policies adopted by different governing coalitions. The strength held by the trade unions. The strength held by the trade unions was quite unique among post-socialist countries. The trade union density rate was around 70% in the early 1990s and the trade unions managed to block a proposed wage freeze in 1992. They organised several general strikes and thereby blocked/limited some of the more radical liberalisation policies. However, their strength started to decline at the turn of the millennia following the drop in the density rate, albeit they still managed to have a very important role in the policymaking while maintaining a strong veto position in the political system (Hočevar 2020; Podvršič 2023).

The social bloc that played the dominant role in the processes related to the country's transition before 2004 was based on collaboration between crucial political/bureaucratic actors mainly recruited from among former Party officials, 'red directors' and management (not yet proper capitalists) and the already constituted small portions of owners of companies and their managers. After 2004, even though important changes were made in the persons and actors involved

² The most important innovation was the proposal for a flat 20% tax rate, which would have seriously harmed the existing welfare state network. The proposal was successfully blocked by the unions, although some other tax reductions were implemented, while more flexible employment legislation was adopted (Hočevar 2025).

in the dominant social bloc, the social bloc was not disintegrated and instead was reformed and reshaped. Many former allies of the liberal political spectrum either joined the new Janša government or were still able to pursue their interests by way of silent cohabitation, while others were politically replaced. Yet, as a result of pressures of the Single Market and the economy's continuing strong export orientation, the main interests remained the same. Thus, on the side of politics there were important changes, and on the other side the economic actors involved in the social bloc changed only partly due to the willingness of some managers to cooperate with the new government in order to accomplish their primary goal – to become the owners of companies³ (Bembič 2017; Podvršič 2023; Hočevar 2025).

The social bloc was largely based on three elements: 1) political support for domestic companies (especially export-oriented ones) through various regulations and on the limiting wage rises so as to make exporters more price-competitive, as well as those oriented to the internal market in order for them to be able to survive the international market competition at all; 2) the prevention of the mass expansion of foreign capital in Slovenia with policies preventing or very selectively allowing foreign capital to penetrate and privatise companies and banks, while seeking ways to form a strong domestic capitalist class recruited from the management of companies and the state economic bureaucracy; and 3) reducing the rate of inflation and meeting the requirements for accession to the EU and EMU.

SLOVENIA'S TRANSITION AND EMPLOYMENT AND SOCIAL POLICY BEFORE 2008: A BRIEF OVERVIEW

If we turn now to the precise policies, numerous social pacts were formed with the core goal of limiting inflation by ensuring that wage rises lagged behind increases in productivity. This policy remained in place until 2007; the trade unions accepted that wages would lag behind in exchange for implementing certain other social policies.

The neoliberal and social investment model of active labour market policies introduced gradually after 1998 included the future making of social benefits conditional on participating in active labour market policies (ALMPs). Instead of a single mandatory pension pillar, a three-pillar system was introduced. The reform of the late 1990s also slowly increased the retirement age, extended the period for calculating the pension, and reduced the assessment rate for pensions. The initial proposal of the LDS-led government had been much stricter,

³ The EU framework and EU accession played very important roles in the transition period since with its conditions and accession negotiations the EU had an important role in creating broader policy frameworks, sometimes even exact policies, in the member states and also potential member states. Throughout the negotiation processes with Slovenia, the EU stressed that the policies of the governments were not sufficiently market conforming and that more liberalisation and privatisation should be implemented (Hočevar 2023).

and while the unions managed to block that reform with strikes and protests, in the end they accepted a reform to liberalise the pension system (Podvršič 2023; Hočevar 2025).

Significant developments also occurred in the field of healthcare as commercial insurance companies grew in strength and governments began the process of privatising healthcare services. The institute of supplementary health insurance was introduced in 1993 and until 1999 collected by the Public Health Insurance Institute of Slovenia. In 1999, the collection of supplementary health insurance was transferred to the semi-private and private insurance companies established by then. The Janša government expanded the two-tier system with concessions, yet this turned out to be the basis for the subsequent privatisation of healthcare services (Hočevar 2025).

Employment policies initially showed a strong pro-social character. In 1993, the Worker Participation in Management Act was passed. In 1997, the Act on the Guarantee Fund of the Republic of Slovenia was adopted; in 1998, the Act to Amend and Supplement the Act on Job Placement and Unemployment Insurance was passed, while in 1999 the Health and Safety at Work Act was adopted (Bembič 2018). Crucially, in 1995 the statutory minimum wage was adopted, which was a major victory for the trade unions. The ESC proved to be one of the places to negotiate the implementation of the minimum wage. Nonetheless, the main policy measure adopted on the ESC level in this time was the acceptance that wage rises would lag behind productivity growth (Hočevar 2025). The Employment Relationships Act adopted in 2002 was referred to as a mini constitution for workers because of the relatively strong worker protection it afforded (Stanojević 2018), even though it entailed elements of activation while also introducing the possibility of part-time work, whereas the reform in 2007 saw the Janša-led government pass through a new Act on Employment Relations whose central goal was to promote flexibility (Hočevar 2025).

Slovenia's transition certainly reflected quite a pro-social character, featuring the strong involvement of the trade unions. Analysis of policies adopted after the mid-1990s suggests this coordination and neo-corporatism were in fact also used to legitimise policies with very little to do with neo-Keynesianism and clearly fostered open liberalisation. These reforms' extent and scope depended predominantly on the trade unions' strength to block these reforms and the ideological orientation of the governing coalition then in office. The framework sketched out above shows the social and employment and labour market policies were somewhat contradictory, often facilitating the interests of the state and the management social group/capitalist classes, yet at times also accompanied by strong social elements and pro-worker legislation. While this may be explained by the strength wielded by the trade unions and their ability to resist, block harsh neo-liberal policies, and negotiate pro-social and pro-labour legislation, it still does not shed any light on the interests and ideational framework of the dominant social blocs in Slovenia in this period of time.

METHODOLOGICAL NOTE – ANALYSING STRATEGIC DOCUMENTS OF THE STATE

Textual analysis provides various options for analysis, depending on the different epistemological and methodological assumptions. We follow the socio-historical approach developed by Ellen Meiksins Wood (2008) and Neil Wood (1978). The hermeneutical approach emerged from the Cambridge School with its strong focus on the context, although one that chiefly encompasses various textual materials, discourses, and institutional politics. The socio-historical approach broadens this context to include property and class relations (Meksins Wood, 2008). As van Apeldoorn explained with respect to another context, values and different discourses “do not float about in an endless universe of meaning, but are produced by human agency in the context of social power relations, and as such are also linked to the strategic action of social actor” (van Apeldoorn 1998, 15). Beside this epistemological position, in this article we conduct content analysis to analyse the main ideas, presumptions and goals found in the strategic documents of the Slovenian state.

Four general national development strategies adopted between 1995 and 2005 are examined. These strategies were adopted by different governments. In these strategies, the core stress was on the pace and depth of capitalist reforms, and the efforts made to join the EU and the Single Market.

Table 1: LIST OF NATIONAL DEVELOPMENTAL STRATEGIES OF SLOVENIA, 1995–2005

Year	Title
1995	Strategy of Economic Development: Approaching Europe – Growth, Competitiveness and Integration (Strategija gospodarskega razvoja: Približevanje Evropi – rast, konkurenčnost in integriranje)
1998	Strategy of the Republic of Slovenia for Integration into the European Union: Economic and Social Part (Strategija Republike Slovenije za vključitev v Evropsko unijo: ekonomski in socialni del)
2001	Strategy of Economic Development of Slovenia 2001–2006 – Slovenia in the New Decade: Sustainability, Competitiveness, EU Membership (Strategija gospodarskega razvoja Slovenije 2001–2006 – Slovenija v novem desetletju: trajnost, konkurenčnost, članstvo v EU)
2005	Strategy of Development of Slovenia (Strategija razvoja Slovenije)

Source: author’s own compilation.

Focus is given to the following policy fields:

1. Social policy: strengthening or limiting the importance of public security systems; introducing for-profit organisations in the social security system.
2. Employment and labour market policy: greater flexibility of employment or stronger protection; the importance of active labour market policies

(ALMPs); strengthening or softening the conditions to be entitled to unemployment benefits etc.

Below we concentrate on the four strategies through a detailed investigation of the crucial policy frameworks, policy proposals in the two fields, together with the central ideas and underlying themes. Content analysis is applied while studying the text in the strategic documents, with close attention paid to the main concepts and supporting notions, yet also also the non-semiotic framework, which influences the textual meanings, is considered. The socio-historical approach is used in the discussion section to explain the specific material (and non-material) context of these strategic documents, the different competing interests then in play, as well as the particular property relations that saw rapid changes in the 1990s and early 2000s in Slovenia.

EMPIRICAL ANALYSIS OF STRATEGIC DOCUMENTS

All four strategic documents under analysis were adopted while various coalition governments held office. The analysis is accompanied by a general introduction intended to capture the broader framework of each strategy, while looking in detail at those aspects of the strategies that deal with social, employment and labour market policies.

Strategy of Economic Development: Approaching Europe – Growth, Competitiveness and Integration

The first overall strategic document of Slovenia was adopted in 1995, just as the country was beginning its EU accession process, with Slovenia making a formal request to become a candidate for EU membership in 1996. The authors of the Strategy explicitly called for the necessary alignment of all policy measures with the market logic, writing: “The measures of the state and economic policy makers must be market-conform, as the following rule applies: the market is here, the only choice the state has is to ‘cooperate’ with the market or to lose to it” (Potočnik et al. 1995, 26).

Regarding the anticipated changes in the social security system, the Strategy’s authors advocated “incremental transformations” (Potočnik et al. 1995, 103). However, the goal of these reforms was in fact quite (neo)liberal – lowering the costs of the social security system, introducing new, private and for-profit organisations in the scheme, and making individuals more responsible for their own welfare.

Under the strategy, the new social security system was to be based on three pillars. The first pillar was to be obligatory and managed by the state. In reality, the legacy of socialist self-management meant that in Slovenia “almost all social security is based on mandatory and state-regulated social insurance” (ibid.). Still, this was to be radically altered by making this pillar less important. The second pillar was business insurance and specific forms of social security, which the

Strategy's authors argued could also be compulsory, although managed privately. These types of social insurance had by that point in time played a valuable "social function, which will be greatly reduced in the future" (ibid.), while companies were to decide for themselves to what extent and even whether they would commit themselves to the social security of their employees. The third pillar was the individual pillar, or "individual provision and various forms of voluntary private insurance" (ibid.). The authors of the Strategy viewed this pillar as crucial, which "will be greatly strengthened in Slovenia in the future" by transforming "private savings" into "greater individual care for individual social security – one will take more responsibility for it" (ibid.). The Strategy also envisaged that public institutions in the social security system should be complemented by non-profit, voluntary, and also profit-oriented organisations (Potočnik et al. 1995, 104).

The main goal in the field of employment and labour market policies was "increasing labour mobility" based on two underpinning elements: 1) upskilling of the workforce; and 2) reducing employment security (Potočnik et al. 1995, 31). Within this framework, the Strategy's authors proposed quite radical pro-market measures. They proposed introducing more radical ALMPs with the goal to contribute to "vocational training and retraining and greater sectoral and regional mobility of the workforce" (Potočnik et al. 1995, 76). They additionally openly called for greater employment flexibility and to deregulate the labour market by proposing: a lowering of payroll tax, shortening of notice periods for redundancies, decreasing redundancy payments and cash benefits for the unemployed, and stricter control over who is eligible for unemployment status (ibid.).

The strategy also refers to the listed possible flexible types of employment as needing to be implemented so as to achieve the goal of ensuring the workforce's greater flexibility and mobility. Part-time work, contract work, working from home, and fixed-term contracts were identified as employment types to be encouraged. Further, the entrepreneurial logic of self-employment was seen as a way of limiting "informal work" (Potočnik et al. 1995, 77). The Strategy also proposed that important changes be made to the social security system for unemployed, linked to the ALMPs through greater conditionality of benefits, while also highlighting the need to change the pension system by reducing the financial burden on the state budget (Potočnik et al. 1995, 105–106).

Strategy of the Republic of Slovenia for Integration into the European Union: Economic and Social Part

The second strategic document was adopted in 1998, the year when Slovenia also officially became an EU candidate state. The whole strategic document was devoted to the EU accession process, as already clear from the document's name: Strategy of the Republic of Slovenia for Integration into the European Union. Like with the 1995 Strategy, the 1998 Strategy principally concentrated on promoting for more competition and more market relations and dependence: "Competition policy is one of the essential elements for the creation of an internal market and

its efficient functioning /.../ Competition policy ensures the most efficient allocation of resources and implies the elimination of any government intervention in price setting” (IMAD 1998, 61).

When it came to social policy, the basic analysis remained the same as for the 1995 Strategy. The authors argued that compared to other European social security systems the Slovenian security system remained largely based on “compulsory state insurance”, which “covers almost the entire social security”. They openly admitted that the “level of social protection is quite high and the current social security system is quite expensive. As a result, public finances are under pressure, which directly threatens the sustainability of the state budget” (IMAD 1998, 137). They were critical of the fact that business and individual responsibilities for social security were minimal, while pointing out that in this field “the role of the state will decrease and the role of individuals will increase” (IMAD 1998, 135). The basic goal was to shift “from a system in which the government provides all elements of social solidarity to a system where these functions are largely taken over by the market, and in part by various types of voluntary organisations” (IMAD 1998, 138). The Strategy was clear when stating that all individuals “should ensure social security for themselves and their family; the state is responsible for establishing equal opportunities” (IMAD 1998, 138).

As concerns employment and labour market policies, the 1998 Strategy was fully committed to implementing greater labour market and employment flexibility. The authors wrote that the levels of new employment contracts and their termination were well below the average levels seen in market economies in the 1970s and 1980s. The reason for this was said to be the high protection afforded to employees: “The rather low external flexibility or external numerical flexibility (adjustment of the number of employees to production needs) could be explained by the considerable employment security that is still provided by legislation in Slovenia” (IMAD 1998, 149). The dismissal costs for employers were deemed too high, while the entire procedure for dismissal – especially the long notice and severance pay – was “among the highest and most complicated in Europe for most categories of workers” (IMAD 1998, 150).

As a critical element of upcoming reforms in the field of employment and labour market policies, the Strategy stressed two goals: “improvement of the quality of life and the activation of human capital potential in favour of increasing labour productivity and improving the level of competitiveness”, while the path towards these goals was seen in the “balance between the level of employment security and labour market flexibility” (IMAD 1998, 151). It was deemed necessary to implement greater labour force mobility and dismantle “some of the institutional rigidities of the labour market and social security regulation that lead to less flexibility of the labour market” (IMAD 1998, 151). The Strategy’s authors added that in “the medium term, labour market policy will seek to shift towards active measures” (IMAD 1998, 153). The ALMPs were to be primarily focused on the education of adults, vocational education and training, and

through greater control over the unemployed and greater incentives for employing the unemployed, while shortening the maximum period for being eligible for unemployment benefits (IMAD 1998, 153).

Strategy of Economic Development of Slovenia 2001–2006 – Slovenia in the New Decade: Sustainability, Competitiveness, EU Membership

This Strategy first refers to the claimed individualisation and the need to adapt and transform the social security system according to individual preferences and requirements: “Individualisation will therefore be one of the key directions of future development” (Mrak et al. 2001, 114), while “the responsibility of users and their willingness or involvement in solving their own social problems will also have to be given greater importance” (ibid.). The state’s role was to change “from the function of ensuring the provision of public services to the function of regulating – determining the scope and conditions for the provision of public services and the necessary minimum standard – and supervising the provision of these services” (Mrak et al. 2001, 115). The new Strategy even more explicitly encouraged the privatisation of the social security system (ibid.). Once again, the document made it clear that cash benefits would be linked to ALMPs, “which will help a larger part of the population than before to be able to start providing social security for themselves” (ibid.).

They envisioned four pillars of future employment and labour market policies: 1) programmes for increasing the employability of the population – in particular, different programmes of lifelong learning, vocational education; upskilling and reskilling; 2) programmes for fostering entrepreneurship – increasing the number of small and medium-sized companies by cutting labour taxation; 3) the adaptability of companies and workers was to be achieved via mutual agreements mostly regarding more flexible working arrangements; and 4) equal opportunities for both genders in the labour market and employment, lowering gender pay gaps, and achieving work–family life balance (Mrak et al. 2001, 54).

The Strategy states that the “new approach to employment policy complements traditional active employment programmes with measures to increase the flexibility (flexibilisation) of business and employment /.../” (Mrak et al. 2001, 53). The Strategy’s authors argued that more funds would have to be made available for ALMPs. The strategy also foresaw the individualised tailoring of ALMPs, training and reskilling, with the active participation of individuals (ibid.). Here, the Strategy fostered specific education and training programmes “to be tailored to the needs of the individual and targeted as much as possible”, whereas the vital element was encouraging the “fastest possible return to work for unemployed people and to promote lifelong learning” (ibid.).

The Strategy of Development of Slovenia

The Strategy of Development of Slovenia was adopted in 2005 and is the shortest because it was partly written as an action plan, including clear policy

frameworks, goals and policy measures. Nevertheless, the Strategy of 2005 had a more radical tone compared to the previous developmental path. Namely, it includes the clear statement: “In order for Slovenia to achieve these ambitious goals, it must prepare and implement fundamental structural reforms and change its current development pattern” (Government of the Republic of Slovenia 2005, 7). The ideal new development model for the country was seen in the “features of European models of liberal economy and partner state”, while a new “shift towards ensuring greater competitiveness and sustainable development of Slovenia” was declared necessary. The goal of the new Slovenian developmental model was a “social market economy, which will connect a more liberal and market economy with a more economically efficient and flexible, but social partner state” (Government of the Republic of Slovenia 2005, 7–8).

Among the broad framework of policies, the Strategy pushed for further liberalisation. “The solution therefore lies in the reform of social systems towards clearly defined and limited universal public social security programmes, the implementation of various forms of public-private partnership, a greater degree of business rationalisation of social systems and greater responsibility of individuals” (2005, 16). The Strategy explicitly proposed the following policy frameworks and policies: enforcing greater individual responsibility for one’s own situation; adapting the welfare state to a long-living society; activation elements in social systems; preventing the accumulation of social benefits; changing the healthcare system for the sake of quality and fiscal sustainability; and promoting public-private partnerships in social programmes (Government of the Republic of Slovenia 2005, 37–38).

In relation to the labour market, the Strategy explicitly argued for broader “flexibility of the labour market” (Government of the Republic of Slovenia 2005, 8). More concretely, its authors proposed “increasing the flexibility of employment relationships and employment (annual work accounting, part-time work, job sharing, flexible working hours, home and teleworking and other atypical forms of work)”; introducing more ALMPs, which ought to “ensure activation, employment and social inclusion” while also emphasising the need to introduce “all other forms of education and training and recognition of acquired knowledge and competencies in employment” (Government of the Republic of Slovenia 2005, 37). Crucially, the Strategy envisioned the liberalisation and decentralisation of industrial relations institutions by invoking other “partners” and stakeholders instead of the corporatist arrangements of the social partners (Government of the Republic of Slovenia 2005, 21).

CONTINUITY OR A BREAK IN THE SOCIAL AND EMPLOYMENT POLICY FRAMEWORKS?

All four strategies basically proposed the liberalisation and flexibilisation of labour market and employment; encouraging more ALMPs, reducing employment protection, and making the receipt of benefits subject to conditions. The

policy framework of social policies expressed in the strategic documents, and reflecting the main interests of the respective social bloc(s), was largely based on the individualisation of responsibilities, gradual privatisation of social security systems by allowing for-profit institutions to enter the system, introducing different private social security schemes, activation principles etc. The labour market and employment policy proposals and frameworks were dominated by narratives of flexibility and activation.

However, notwithstanding these clear continuities and commonalities, there are still two key differences among these strategic documents.

First, after being established in 1994 to reduce the pressure of inflation by ensuring wages lagged behind productivity growth, the neo-corporatist system was seen as instrumental for implementation of these policies. Such a view is quite evident in three strategic documents – 1995, 1998, 2001. Yet, this is an important element because even though all of these policies were discussed and envisioned through the neo-corporatist system, they had very little to do with the classical neo-corporatist content of social and labour market policies. The 2005 Strategic document in any case foresaw an important transformation of the neo-corporatist system – instead of the ESC and the classical neocorporatist institutional design, the 2005 Strategy wanted to replace this with a broader “partnership” approach, that in fact entailed the dismantling of the corporatist institutional system, a stronger attack on labour rights, curtailing the welfare state, and introducing more flexibility.

Second, one can observe a shift concerning the gradualist transitional model adopted in Slovenia. Although the first three strategic documents focus on gradualism as a necessary transitional model – it was never considered to be the final goal of the country’s transition. It was seen as a necessary precondition in order for Slovenia not to suffer large economic and social breakdowns. Further, as shown, this did not mean that the marketisation and liberalisation processes were not viewed as necessary. On the contrary, they were put at the forefront of social and employment policy, noting that also since 1995 a pressing imperative has actually been to abandon gradualism in favour of market liberalisation policies. Solely in the strategic document of 2005 is there a clear and open rejection of gradualism and attack on gradualist policies, while gradualism is identified as the central obstacle to implementing neoliberal economic, social and employment policies, whereas previously it was the first step towards full market liberalisation.

Our analysis shows that a true epistemic/ideological break was never demonstrated in the strategic documents providing social and employment policy frameworks and policy proposals since all of these documents had the same assumptions and goals. The changes in the political arena and the dominant social bloc after 2004 did not influence the ideational framework of employment, labour market and social policy. While considering the material conditions and the interests of the respective social blocs, three elements stand out for having

substantially influenced the policy proposals made and the policies adopted (as explained in the third part of this article).

First, the economic technocratic ruling group and emerging capitalist class were pushing for greater liberalisation and privatisation, but were prepared to accept compromises as they needed the trade unions' support to block any massive privatisation to foreign capital. This does not mean that ideologically they were not pushing for policies in their interest, but that the trade unions were strong enough to partly curtail or block some of the biggest liberalisation reforms in these policy fields (Lukšič 1998; Stanojević and Krašovec 2011). However, as soon as the ruling group and capitalist class found a way to accomplish that – via debt in the context of the Slovenian economy's financialisation, they no longer needed the trade unions' support for their economic interests, and even more radical neoliberal policies could be proposed – like those contained in the 2005 Strategy, although implemented only in part because the unions remained strong (Hočevar 2025).

Second, as an outcome of the country's export-oriented growth model, labour market flexibility, tax reforms, and limitations on the welfare state were in the interests of the entire economy, in particular the managers/capitalists who aimed to ensure their businesses remained profitable and in some cases for their companies to survive after Slovenia's entry to the European Single Market. At the same time, making entitlement to social benefits subject to conditions and introducing ALMPs were deemed necessary for restoring and maintaining the competitiveness of the economy, especially of the export sector (Podvršič 2023).

Third, very important continuity is observable among the persons in charge of preparing the crucial strategic documents. It is apparent that a vital role in preparing two of the documents was played by Dr Janez Šušteršič, who has been closely associated with neoliberal policies and also later became minister in the right-leaning government in the crisis years 2012–2013, was named the Director of IMAD in 2001 during the LDS term in office. Some other individuals were also actively involved in preparing at least two of these strategic documents (such as Matija Rojec, Franjo Štiblar, Marjan Senjur, Mojmir Mrak). While some were perceived not to be very pro-neoliberal economists, the strategic documents finally issued place these perceptions in a slightly different light because, as explained, all of them held very similar postulates and goals, but also different approaches to how to achieve them (Hočevar 2025).

Some sort of overlapping is also evident between the strategic documents and the EC's annual assessment of Slovenia's progress on its path towards the EU (see Hočevar 2023), where the liberalisation reforms featured strongly. One might also claim that the strategic documents were a technocratic way to satisfy Brussels and the EU's technocrats. Yet, as shown in our analysis, there were also some attempts to implement policies that only came to a halt when the trade unions reacted against them, and the response of the government and the strongest economic groups was to accept this in order not to lose the trade union's approval needed for the primitive accumulation of capital.

CONCLUSION

In the article, we focused on analysing the strategic documents of the Slovenian state in the period of the transition to a capitalist economy and during the EU accession period before the start of the global financial crisis and EU sovereign debt crisis. We analysed four relevant documents in detail and, pursuing the approach developed by Wood and Meiksins Wood, contextualised the strategic documents, focusing on the interests of the respective dominant social bloc made up of factions of the capitalist class and the political bureaucracy.

The analysis reveals the respective social bloc primarily promoted the Slovenian economy's international competitiveness by way of price competition and increased exploitation. Moreover, strong ideational and ideological continuity was evident as regards the crucial social and labour market policies in this time, and no ideological break was shown to have occurred in 2005, contrary to what is often claimed in the literature. The previous strategic documents had an equal focus on social policy, employment policy and labour market liberalisation. This is not to say the different governments adopted similar policies – on the contrary. The policies adopted varied – depending on (overlapping) class interests and class power relations – but shared a clear ideological goal: to introduce greater liberalisation, market relations and privatisation in the field of social policy and labour market and employment policies. There were attempts to implement more radical neoliberal policies during the terms in office of LDS and the first government led by Janez Janša. The success of these policies relied on the strength and mobilising capacity of the trade unions, which managed to prevent the most radical reforms being implemented before 2008.

Our analysis also suggests the liberalisation/neoliberal model of social and employment relations was not imported to any large degree, but was equally considerably homegrown, which may have additionally underpinned different analyses of how to resolve Slovenia's sovereign debt crisis and to a rethinking of the narrative and importance of external pressures for the neoliberalisation of the Slovenian economy. Price competitiveness was the essential policy goal of the respective social blocs up until 2008, except they did not have enough domestic nor external support. The crisis in 2008 provided the structural framework for radical changes.

Future research should consider the post-2008 crisis and Slovenia's current development model, as well as the precise interests held by the dominant social bloc(s). The capitalist side of the dominant social bloc, or what is left of it – the export-oriented manufacturing sector – continues to promote price competitiveness by trying to orientate its supply chains towards the Far East (especially China) (see: Veselinovič 2025). The political bureaucracy seems reluctant to support either of these two goals, adopting balanced social and employment policies (notably due to the rising importance of The Left in the last decade, albeit this is subject to change with alterations in the governing coalitions, while the trade unions have lost their structural power as strong veto players) and as a result

of the firm pro-Western political orientation of the political class in general. In addition, further research should take the role of the EU into account. On one hand, the EU supported austerity and anti-social policies and policies to boost employment and labour market flexibility during and after the 2008 crisis while, on the other, it has taken an important step towards more pro-social and pro-labour policies since 2016–2017.

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GRADUALISTIČNI KEYNESIJANIZEM ALI ŽELENA LIBERALIZACIJA? ANALIZA STRATEŠKIH DOKUMENTOV DRŽAVE IN PROTISLOVJA NEOKORPORATIVIZMA V SLOVENIJI (1991–2008)

Povzetek. Članek prispeva k razpravam o naravi, obsegu in globini neokorporativističnih političnih dogovorov v Sloveniji pred krizo leta 2008 prek analize interesov posameznih prevladujočih družbenih blokov, kot so se pojavili v začetku devetdesetih let prejšnjega stoletja; njihovi interesi so bili najbolj jasno izraženi v strateških dokumentih države. Analiza kaže, da je bila pod neokorporativistično strukturo in nekaterimi neokeynesijanskimi politikami, ki so bile rezultat socialnega partnerstva, že dolgo pred letom 2004, ko naj bi se neokorporativistični konsenz začel krhati po nastopu nove desne vlade in vstopu Slovenije v EU in NATO, navzoča močna tehnokratska, politična in kapitalska usmeritev k uvedbi večje liberalizacije na področju politik zaposlovanja in socialnih politik.

Ključni pojmi: Slovenija, neokorporativizem, državne strategije, kapitalizem, družbeni blok.

Joachim BECKER*

NEO-CORPORATISM AND POLITICAL PARTIES: SLOVENIA AND AUSTRIA**

Abstract. The article analyses the rise, erosion and contestation of neo-corporatism in Austria and Slovenia from a régulationist perspective to highlight the role of political parties. The various relationships between key organisations of capital and labour on one hand and political parties on the other are shown to play a key role in understanding the different dynamics of the contesting of neo-corporatism in the two countries. While organisations of capital and labour have strong links with political parties in Austria, this is not the case in Slovenia. These distinctions have led to a crucial difference in the phase of declining neo-corporatism. The links between organisations of capital and labour with major political parties have contributed to the (precarious) institutional stabilisation of neo-corporatist arrangements in Austria, whereas in Slovenia the key right-wing party managed to destabilise a vital pillar of neo-corporatism.

Keywords: neo-corporatism, Austria, Slovenia, political parties.

INTRODUCTION

Neo-corporatism is a specific mode of regulating capital–labour relations and of macro-economic management involving tripartite bodies of capital, labour and the state. Neo-corporatist arrangements are found at the intersection of civil society and the state (cf. Schmitter 1979, 9). As the only country in Central and Eastern Europe, Slovenia has been classified as “neo-corporatist” in comparative capitalism research (Bohle and Greskovits 2012). However, in Slovenia neo-corporatism only arrived in the 1990s as part of the capitalist transformation. At the time, neo-corporatism already had its ‘golden years’ behind it in long-established European capitalist states. In Austria, a model country of neo-corporatism, social scientists had already in the mid-1980s observed that the “social partnership” (Gerlich 1985), namely, the Austrian version of neo-corporatism, was “in crisis” (Gerlich et al. 1985). The blossoming of neo-corporatism in Slovenia

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was brief. In the early 2000s, a period of erosion and contestation of neo-corporatist arrangements started in Slovenia.

The article aims to trace the politico-economic “conjunctures” (in the broader sense of the French term) of the rise, blossoming and erosion of neo-corporatism and to identify the actors advocating and contesting neo-corporatism in a partly diachronic comparative analysis of Slovenia and Austria. It associates the rise and decline of neo-corporatist arrangements with struggles about the “strategic selectivity” (Jessop 2002, 40) of the state. Attention is paid to the role of the organisations of capital and labour on one side and political parties on the other, as well as their interaction. While one may find substantial research on the role of parties in Austrian neo-corporatism, this issue has hardly been considered in the case of Slovenia. The trajectory of Slovenian neo-corporatism is accordingly to be analysed from a new angle. The two countries were chosen because they are small, industrialised, export-oriented economies and regarded as model cases of neo-corporatism. The French theory of *régulation* provides the theoretical framework of the article.

NEO-CORPORATISM: A RÉGULATIONIST PERSPECTIVE

Neo-corporatism is understood as a specific mode of regulating capital-labour relations and macroeconomic management that involves capital, labour and the state (Schmitter 1979). This form of interest mediation is characterised by “*ex ante* concertation” of decisions of the actors involved (Jessop and Sum 2006, 112). Therefore, it embodies social or class compromises.

Neo-corporatist studies in a narrower sense have focused on institutional arrangements viewed as favourable to the stability of neo-corporatist tripartite arrangements. Such arrangements were the existence of centralised labour and capital organisations along with centralised collective bargaining arrangements (Royo 2001, 4 f.). Thus, the institutional focus has tended to be confined to the civil-society side of the tripartite arrangements. However, business organisations and trade unions often maintain strong links to “political society” in the Gramscian sense, including political parties. Their role has tended to be under-theorised (cf. Grande and Müller 1985, 25; Ortega Riquelme 1997, 42 f.). Political parties can themselves be key actors propelling neo-corporatist arrangements, especially in order to create stable socio-political conditions for smooth capital accumulation.

The major crisis and restructuring of European economies in the 1970s triggered discussions on the crisis of neo-corporatism. Since key neo-corporatist institutions and social compromise-making were situated on the level of the nation state, internationalisation was viewed as a factor contributing to erode neo-corporatism. The strengthening of EU institutions and resultant forms of multi-level governance were seen as a further challenge to neo-corporatist arrangements in Europe (Karlhofer and Táló 1996).

To understand the dynamics entailed in the rise and decline of neo-corporatist

arrangements, a theoretical framework conceptually encompassing the interaction between accumulation dynamics, interest formation, and the state is required. The theory of *régulation* provides such a framework. With its roots in Marxism, it later partially developed in an institutional direction (Becker 2024a). The concepts are on the level of intermediate abstraction. For *régulationists*, specific forms and strategies of accumulation (also of social reproduction) require particular sets of social and legal norms and policies, i.e., a fitting “mode of regulation” (Boyer 1986, 23, 54 ff.) or “dispositive of regulation” (Becker 2002, 122 ff.).

Regimes of accumulation can be classified along different dimensions (Becker 2002, 64 ff.). For the analysis of neo-corporatist dynamics, two dimensions are crucial: the productive or financialised character of accumulation and the extra- or introverted character of accumulation. Accumulation can be primarily based on productive activities and productive investment or be geared to financial placements. In the former case, accumulation would be primarily productive, in the latter case, it would be primarily financialised. Financialisation has emerged in situations when productive accumulation had become exhausted and capital was looking for flexible forms of investment (Becker 2002, 74 ff.). Historically, neo-corporatism emerged in constellations when and where productive accumulation with quite a long-term time horizon of investment and the corresponding interest of capital in stable institutional arrangements dominated. The second crucial dimension for neo-corporatist arrangements is whether accumulation is chiefly geared to the domestic market or outward-looking. In Western Europe, neo-corporatism arose when accumulation had a strongly introverted character and the internationalisation of production was low.

Capital interests try to ensure social norms and legal norms as well as policies that would sustain their accumulation strategies. From the side of labour, issues of social reproduction – wages, social security arrangements – play a key role. For both sides, gaining privileged access to the state is essential. Big corporations often enjoy direct access to state decision-making centres, whereas both smaller companies and workers must rely on interest organisations to influence the political agenda and state policymaking. Capital and labour organisations seek to shape the access channels to the state in their own interests. Struggles over access channels to state decision-making centres and the strategic selectivity of the state are particularly intense at times of great crises because accumulation strategies are substantially re-adjusted and social blocs reconfigured. The distribution of competences between different territorial levels of the state (sub-national, national, European) also impacts the state’s strategic selectivity.

Neo-corporatism is a certain form which influences the access of capital and labour – and of specific fractions or groups with capital and labour – to the state. As civil society organisations, business associations and trade unions might also try to obtain – at least indirectly – access to state decision-making centres via political parties, which are part of “political society” in the Gramscian sense. Simultaneously, political parties might try to broaden their influence through

ideologically close civil society organisations, notably business organisations and trade unions. In the post-war years, the links between mass parties and civil society organisations tended to be strong (cf. Mair 2013, 77 ff.). It was amid this constellation that neo-corporatism in Western Europe started to flourish. Business organisations and trade unions were often closely linked to certain parties, and cadre of specific parties held key positions in the representative bodies of capital and labour. In this way, party representatives could be vital actors within trade unions and business organisations and parties could thus indirectly, via civil society organisations, be part of neo-corporatist arrangements. This tended to be conducive to the stability of neo-corporatist arrangements (cf. Lehmbruch 1985, 104 f.). With socio-economic changes and the neo-liberalisation of states, political parties began to loosen their links with associated groups (Mair 2013, 85 ff.) and focused increasingly on media-based campaigning. Pedullà and Urbinati (2024, 116 f.) call such parties “light parties”. These changes in the party systems have an impact on neo-corporatist arrangements.

Initiatives for establishing neo-corporatist arrangements and for their weakening/demise can be commenced by both actors on the civil society side – trade unions or business organisations – and on the political side (especially political parties). Specific class-based interest organisations and parties might also act in unison so as to strengthen or weaken neo-corporatist arrangements. This depends on the concrete economic and political “conjuncture” in place.

THE ESTABLISHMENT AND RISE OF NEO-CORPORATISM IN AUSTRIA

Following the Second World War, Austria’s uncertain international status created strong political pressures for domestic concertation between political parties and organisations of capital and labour. The Republic of Austria was re-established directly after the war. A provisional government encompassing the social democrats, conservatives and the communists was formed. Within the government, social democrats and conservatives were the main forces, thereby confining representatives of the Kommunistische Partei Österreichs (KPÖ) to a marginal role (Murgauer 2020). In the post-war years, Austria was under the control of the four Allied powers. Austria’s full sovereignty was only re-established in 1955. In face of the insecure international status, the two main parties strived for domestic political and social compromises in order to enhance their international negotiation position. The two main Austria parties and the Allied occupation powers (including the Soviet Union) accorded priority to re-stabilisation (cf. Rathkolb 1996, 172).

This required a radical break with the interwar years, that is, a period characterised by sharp social and political conflicts. The two political right-wing currents – political Catholicism and the German-national current – had developed into fascist forces. In Austria, two fascist regimes were subsequently established in the 1930s. In 1934, the forces of political Catholicism set up an Austro-fascist

regime that ruthlessly suppressed the social democracy and trade unions. In 1938, Austria was annexed by Germany and a Nazi fascist regime put in place.

The social democrats suffered massively from the two fascist regimes. On a symbolic level, the Sozialistische Partei Österreichs (SPÖ) was able to assure continuity. However, it was the right wing of the party that dominated in the post-war years. The forces of political Catholicism broke symbolically with the past and founded a new party, Österreichische Volkspartei (ÖVP). The core cadre of ÖVP, however, stemmed from Austro-Fascism, albeit not from the top leadership (cf. Müller 1991, 227). Political concertation led to these two parties forming coalition governments until the mid-1960s. They in essence carved up the state into spheres of influence. A two-pronged party state was established. Both parties developed huge clientelist networks on all levels of the state (Ullrich 1996). Likewise, a two-pronged civil society with organic links to the two political camps emerged. Reflecting the respective class bases, SPÖ was particularly strong among labour organisations whereas ÖVP dominated in peasant and business organisations. Even today, associations representing business, agriculturalists and the wage earners are at the very organisational core of ÖVP (cf. Puller 2018). Both parties were hence mass parties with strong civil society links – in line with Mair’s typology. The German national current was also revived – first in 1949 as Verband der Unabhängigen (VdU), then in 1956 as Freiheitliche Partei Österreichs (FPÖ). FPÖ was even more explicitly the party of the “Formers” (“Ehemaligen”), i.e., ex-members of NSDAP (cf. Reiter 2019). From the outset, VdU and FPÖ enjoyed the support of ideologically aligned industrialists (Reiter 2019, 76). Unlike SPÖ and ÖVP, FPÖ has not been embedded in a strong civil society network (Becker 2025, 22).

In the post-war years, a substantial sector of state-owned companies was established. The parties opted for a strategy relying heavily on the steel industries, which had been built up during the Nazi fascist rule (Weber 1996). Private Austrian capital was not strong enough in those years to take these big industries over. The industries were also to be shielded against possible Soviet claims. The state-owned sector also encompassed major banks, endowing the state with extra economic leverage. The parties’ spheres of influence further extended into the state-owned sector. Trade unions gained a stronghold in the state-owned heavy industry. Vast segments of small and medium-scale capital enjoyed strong protection (Traxler 1993, 105). For the economically splintered domestic capital, social and political interest representation was very important.

The post-war reorganisation of labour and capital associations was in line with an orientation towards interest concertation. Highly centralised labour and business organisations were formed. Österreichischer Gewerkschaftsbund (ÖGB) is the sole trade union federation. Political currents are present within ÖGB via ‘fractions’. Concerning business organisations, a key ÖVP official, Julius Raab, favoured a centralised business association, Wirtschaftsbund, linked to the party (Rathkolb 2025, 218). The three chambers – Chamber of Labour (Arbeiterkammer, AK), Chamber of Business (Wirtschaftskammer, WKÖ) and

Chamber of Agriculture (Landwirtschaftskammer) – were based on obligatory membership. Since WKÖ is also a contracting partner for collective agreements, the coverage by collective agreements has remained very high (approx. 98%) until today (Glassner and Hofmann 2023, 95, Tab. 2.1). ÖGB and the three chambers have been involved in the institutionally changing neo-corporatist arrangements. This has implied a form of political symmetry – with ÖGB and AK being under the hegemony of the social democracy and the Chambers of Commerce and Agriculture under ÖVP control. Up to the mid-1980s, interlocking memberships between SPÖ and ÖVP (and their members of parliament) and the interest organisations of labour and capital were very strong (yet have weakened since; Pelinka 1993, 73). The organisation representing bigger industrial firms, Vereinigung österreichischer Industrieller (VÖI), remained outside the neo-corporatist arrangements. On the political side, the FPÖ-aligned list remained marginal in the Chambers and ÖGB.

The first neo-corporatist arrangements appeared in 1947 in the form of five successive wage and price agreements. These agreements clearly prioritised the government's wage and price stabilisation aims. In exchange for institutionalised consultation and being accorded with supporting social policy measures, ÖGB accepted restrictive wage policies. In 1950, more militant workers defied the ÖGB course and organised strikes for higher wages. The strike movement was defeated and denounced as “communist” inspired, even though it enjoyed support far beyond communist trade unionist circles (Tálos 1993, 19 f.; Tálos and Hinterseer 2019; 19 ff; Murgauer 2020, 643 ff.).

Shortly after the strikes, an economic directory with broad coordination agendas was to be established on a formal legal base, albeit only for a limited period. SPÖ, the Chamber of Labour, and ÖGB were strongly in favour of it because they wanted to institutionalise the voice of the labour side in economic affairs. In 1952, the Constitutional Court ruled that this arrangement was not in line with the Constitution as it bound the ministers to the recommendations of the economic directory (Tálos and Hinterseer 2019, 23ff.). As a consequence, later arrangements of neo-corporatism have taken less far-reaching and more informal forms.

In the mid-1950s, a new initiative of neo-corporatist concertation was launched. In particular, wanting to enhance its role in economic policymaking, ÖGB pushed for this. The ÖGB strategy clearly privileged building institutional power via neo-corporatist arrangements. The side of capital only agreed to renewed neo-corporatist initiatives in 1957 after inflation had surged. Issues of wage and price policies formed the core of the new arrangements, which were then extended to other areas of economic and social policies (Tálos and Hinterseer 2019, 26 ff.). Controlled wage development aimed at facilitating exports in an ever more export-oriented version of Fordism. The wage policy, which was aligned with productivity growth, enabled wage growth. This proved beneficial for domestic consumer good industries (Becker and Novy 1999, 135 f.).

In their blossoming years, the functioning of the neo-corporatist arrangements was not substantially affected by the end of the ÖVP-SPÖ coalition arrangements in 1966. First, ÖVP governed alone. In 1970, the ÖVP intermezzo was followed by more than a decade of SPÖ governments. These governments brought democratisation and the social opening up of spheres like universities, together with liberal societal reforms.

EROSION OF NEO-CORPORATISM: THE INTERNATIONALISATION OF CAPITAL, ENTRY TO THE EU, AND THE WEAKENING OF UNIONS

The neo-corporatist arrangements helped to weather the first phase of the crises in the 1970s by supporting a mix of Keynesian anti-cyclical policies, a hard currency policy, and cautious wage policies (which still entailed real wage growth). The fiscal policies were to stabilise domestic demand whereas the fixed parity between the Schilling and Deutsche Mark was to push industrial companies towards stronger productivity growth and provide a stable monetary framework for the increasingly important Western European (esp. German) economic links (Becker and Novy 1999, 135). After 1979, this policy ran increasingly into trouble due to current account deficits. The external constraints began to bite.

In the 1970s, the international restructuring in the wake of the crisis gradually eroded the main conditions of the neo-corporatist arrangement. Industrial capital reacted to the crisis by internationalising production. The social democrat Austrian government was opening the economy ever more to German capital. Austrian industry increasingly became a supplier to German industry (Becker and Novy 1999, 135). This changed the balance of forces among the different capital fractions – largely in favour of foreign capital and to the detriment of domestic inward-looking capital. In the 1980s, the state-owned heavy industry sector, like in many other European countries, faced a serious crisis. Companies were privatised and factories closed down (Scherb and Morawetz 1986). This weakened the trade unions, which had some of the most important strongholds in the state-owned steel industry. Neo-corporatist arrangements lost their effectiveness in shielding workers from the effects of the industrial restructuring and crisis.

Workers were less content with neo-corporatism. Trade union membership and density started to decline. Unionisation (without counting pensioned union members) declined from 48.5% in 1985 to 44.0% in 1991 (Karlhofer 1993, 123) and to 37% in 2000 (Glassner and Hoffmann 2023, 95, Tab. 2.1). More generally, resentment with the two-pronged party state and its clientelist practice grew. FPÖ was the party which was to take up the discontent. With Jörg Haider taking over the party's leadership in 1986, FPÖ began to campaign aggressively against migration, social partnership, and the pervasive influence of SPÖ and ÖVP. In a clearly neo-liberal vein, FPÖ advocated “unfettered competition as the ultimate principle for solving societal problems” (Ptak and Schui 1998, 100). The party criticised the neo-corporatist arrangements in its 1985 programme as a

“dictatorship of the apparatuses” (cited in Ptak and Schui 1998, 101). Regarding labour relations, FPÖ took an aggressive neo-liberal stance already in the mid-1980s (cf. on conceptual issues Becker 2024b). FPÖ may be regarded as an early example of a political force combining neo-liberalism with an aggressive anti-migrant stance (on the ideological background, cf. Slobodian 2025).

With the FPÖ turning further to the right, SPÖ ended its short-lived coalition with it. SPÖ and ÖVP again formed a coalition government. Seeking EU accession became the basis of this renewed coalition formula. This was not in the least a reaction to the formation of the EU Single Market, which substantially increased the entry barriers for businesses in Austria. In particular, capital groups strongly oriented to the EU favoured rapid EU entry. VÖI, representing big business, spearheaded the pro-EU camp. In the more heterogeneous Chamber of Business, the issue of EU accession caused more debate. In the end, WKÖ also positioned itself clearly in favour EU entry (Karlhofer and Tálos 1996, 52 f.).

For Austria to accede to the EU, a referendum was mandatory. The two governing parties, which turned gradually and unevenly towards neo-liberal positions and displayed the erosion of their links with organisations of capital and labour, sought the political endorsement of the “social partners” – i.e., the Chambers and ÖGB. Even though initially there were some reservations in ÖGB, the labour side finally came out in favour of EU accession. The strongest reservations were articulated in the Chamber of Agriculture since many Austrian agriculturalists feared they would be outcompeted by (larger) agriculturalists in other EU countries operating under more favourable agro-ecological conditions. Finally, all “social partners” endorsed EU accession (Karlhofer and Tálos 1996, 50 ff.). Joining the EU in 1995 reduced the possibilities of national economic policy concertation – and, in turn, the scope of the Austrian neo-corporatist arrangements. At the same time, it shifted power relations in favour of (Europeanised) capital to the detriment of labour (Tálos 2015, 186 ff.; Tálos and Hinterseer 2019, 92 ff.). Austria’s EU accession thus changed the strategic selectivity of the state.

AFTER EU ACCESSION: CONTESTATION OF NEO-CORPORATISM IN AUSTRIA

The internationalisation of capital, which included outward investment by Austrian firms, especially banks, in Central and Eastern Europe following the collapse of state socialism, related strengthening of Europeanised capital, weakening of unions, rise of an openly anti-neo-corporatist political force, and entry to the EU, led a third phase of Austrian neo-corporatism that saw the neo-corporatist arrangements being openly contested.

On the level of interest organisations, VÖI as the representative of Europeanised capital groups spearheaded moves to weaken the neo-corporatist arrangements. On the level of political parties, the far-right wing, largely neo-liberal FPÖ (Becker 2018, 20 ff.) came out most vocally against neo-corporatism. A

smaller (neo-)liberal political force, Neos (founded in 2012) has also been highly critical of neo-corporatism and shown anti-union sentiments. Neos has close links with VÖI (Tálos and Hinterseer 2019, 87).

On the level of interest organisations, ÖGB, which continued to lose members and saw the level of (net) unionisation of the increasingly heterogeneous workforce being reduced to 27% in 2019 (Glassner and Hofmann 2023, 102), and the Chamber of Labour have consistently defended the neo-corporatist arrangements as their strategy has continued to hinge on preserving institutional power. On the party-political level, SPÖ and the Greens have been supportive of the neo-corporatist arrangements.

ÖVP has turned into a key battlefield over the future of neo-corporatism. Within the party, forces close to the neo-liberal policy demands of VÖI, but also willing to at least side-line the neo-corporatist arrangements, have become stronger. Wirtschaftsbund, which is intimately linked to the Chamber of Business and represents a much broader array of business interests, shares many of the economic policy demands of VÖI, but defends the crucial role of the neo-corporatist arrangements. As Tálos (2015, 193) notes, the “social partnership” is crucial for WKÖ in order “to preserve its traditional dominant position in political decision-making in Austria vis-à-vis VÖI”. Thus, a crucial conflict between the neo-liberal and conservative concepts of labour relations (cf. Becker 2024b) has emerged in ÖVP.

The contending interests have also clashed about the form of the party. The strongly neo-liberal current has repeatedly sought to diminish the influence of the “Bünde”, representing specific socio-economic interests, in the party and to strengthen the role of the federal executive, e.g., in selecting candidates for parliamentary representation. It also has put greater emphasis on campaigning and marketing techniques. The “Bünde” have tried to preserve their role. They still play a vital role in the party’s presence on the ground (cf. Puller 2018).

Depending on the Balance of Forces, ÖVP has Formed Coalitions Either with FPÖ or SPÖ, Respectively the Greens. Under the leadership of Wolfgang Schüssel, the first coalition between ÖVP and FPÖ was formed in 2000. The government had a strong neo-liberal profile accelerating privatisations, selectively cutting and neo-liberalising the welfare state and pursuing a regressive fiscal policy (cf. Tálos 2019). This was to enhance the export-oriented accumulation model and promote financialisation. In order to facilitate the strongly neo-liberal strategy, the Schüssel governments sidelined the neo-corporatist arrangements – particularly the trade unions and the Chamber of Labour – on key issues, but did not dismantle the institutional arrangements (Pernicka 2006; Tálos and Hinterseer 2019, 100 ff., 132 ff.). It tried to change the composition of the main bodies of the self-governed social insurance in favour of the business representatives (and indirectly in favour of ÖVP members representing the business side). The Constitutional Court ruled that important parts of this reform were not in line with the Constitution (Tálos and Hinterseer 2019, 107).

The side-lining of the “social partners” was asymmetrical because the Chamber of Business and the Chamber of Agriculture still had privileged access to ÖVP (Tálos and Hinterseer 2019, 133). ÖGB and the Chamber of Labour reacted in a two-fold manner. On one hand, ÖGB organised massive protests and a strike against the highly unpopular pension reform (Glassner and Hofmann 2023, 103). On the other hand, the Chamber of Labour (and ÖGB) sought to establish an axis with the Chamber of Business in defence of the neo-corporatist arrangements and were able to find common ground. According to Stern and Hofmann (2018, 41), the Chamber of Business “continued to a pursue social partnership-oriented negotiation strategy”.

Over time, the coalition policymaking produced major tensions within FPÖ. In 2005, FPÖ government representatives and large parts of the parliamentary club left the party and formed Bündnis Zukunft Österreich (BZÖ). In 2006, the strongly right-wing-oriented government came to an end.

For more than a decade, a period of coalition governments between SPÖ and ÖVP ensued. They softened the neo-liberal approach. They re-activated neo-corporatist consultation arrangements (Tálos and Hinterseer 2019, 109 ff.). In 2007, SPÖ and ÖVP took – with the explicit backing of the Chamber of Business, Chamber of Agriculture, Chamber of Labour and ÖGB – steps to strengthen the institutionalisation of the Chambers and the system of social partnership. Through a constitutional amendment, the existence of Chambers as self-governing bodies is guaranteed. The role of “social partner” is also explicitly recognised (Tálos and Hinterseer 2019, 80 f.). The government relied on the neo-corporatist arrangements in order to deal with the international financial crisis of 2008 and 2009, and these arrangements contributed to attenuating its domestic consequences (Tálos and Hinterseer 2019, 127).

The rise of Sebastian Kurz in ÖVP made the pendulum swing back to an ÖVP/FPÖ coalition. Kurz pursued a radical neo-liberal agenda. Inside the party, he reduced the influence of the “social partners” (cf. Tálos and Hinterseer 2019, 103). He relied on orchestrated media campaigns. A strongly pro-business stance and aggressive anti-migration campaigning provided firm common ground between ÖVP and FPÖ.

Like the first ÖVP-FPÖ government, the Kurz-led ÖVP-FPÖ coalition systematically side-lined the neo-corporatist arrangements. It moved even more decisively against the trade unions and the Chamber of Labour. Further, it centralised and changed the balance between capital and labour in the self-governed social insurance system in favour of capital (and indirectly strengthened the influence of ÖVP in the social insurance system). The government excluded the representatives of labour, but not of business from a few public bodies, like the insolvency fund (Tálos and Hinterseer 2019, 131 f.). On the highly controversial issue of increasing the maximum admissible working time, the Chamber of Business sided with VÖI (Tálos and Hinterseer 2019, 134). Access to state decision-making centres became even more asymmetrical in favour of capital

interests, which could rely on their channels in ÖVP. While the agenda of ÖVP and FPÖ overlapped in many socio-economic issues, the two parties clashed on competing attempts to entrench their influence in the state apparatuses, especially in the realm of the security apparatuses (Becker 2025, 25).

After a major scandal in FPÖ (and partly due to the struggles over the security apparatuses), the government collapsed in 2019. Following a short technical government and fresh elections, ÖVP formed a coalition with the Greens. Almost right at its very start, the new coalition was faced with the COVID-19 pandemic. To deal with the economic and social consequences of the pandemic, the coalition sought close cooperation with the “social partners”. The resulting packages were fairly encompassing (Podvršič et al. 2020, 9 ff.). The coalition reactivated the neo-corporatist arrangement also beyond the acute crisis.

The balance of power in ÖVP remained very unstable, as shown by attempts to form a coalition after the 2024 general elections. Partisans of a coalition with SPÖ and Neos and partisans of governing with FPÖ clashed openly. ÖVP started to negotiate with SPÖ und Neos. After Neos left the negotiations because they were dissatisfied with the progress towards a hard-core neo-liberal agenda, the ÖVP partisans of forming a government with FPÖ gained the upper hand. ÖVP stopped negotiating with SPÖ and commenced talks with FPÖ. The common base with FPÖ was a broad consensus on neo-liberal economic policies. A vocal fraction in VÖI favoured this option, as did parts of the Chamber of Business. However, FPÖ insisted on controlling the key ministries, including the Ministry of the Interior, aiming at expanding its own branch of a party state. This was unacceptable to ÖVP. In addition, there were disagreements on areas like the EU and more generally foreign policy and the neo-corporatist arrangements. According to media reports, FPÖ demanded an end to the obligatory Chamber membership and cuts to the financial base of the Chambers. ÖVP objected to this (cf. Becker 2025, 28). The negotiations between the two parties failed. In the end, ÖVP formed a coalition with SPÖ and Neos. The initial steps of the new government show that the neo-corporatist arrangements are set to continue.

In the wake of the failed ÖVP-FPÖ negotiations, rifts between VÖI and the Chamber of Business became more visible than ever before. In an interview with *Kurier*, VÖI President Georg Knill openly disagreed with the retrospective diagnosis of WKÖ president Harald Mader that FPÖ had been in a “Machtrausch” – “power ecstasy” and lacked the capability to govern (Hager 2025, 4). The partial disagreements between the business organisations representing big Europeanised and smaller capital are part of the unstable Austrian power relations.

Following EU accession, the forces hostile to neo-corporatism and forces striving to preserve neo-corporatist arrangements can be observed to be in an open contestation. Depending on the power relations in ÖVP, the changing relationships between VÖI and the Chamber of business and the resultant formation of coalitions, the neo-corporatism pendulum has swung quite strongly.

Tendentally, the position of the labour organisations has been weakened. They continue to focus on shoring up their institutional power via neo-corporatist arrangements. This brings serious risks (Glassner and Hofmann 2023, 122).

THE ESTABLISHMENT AND RISE OF NEO-CORPORATISM IN SLOVENIA

After the country's declaration of independence in 1991 and conflict with the Yugoslav federal government, the Slovenian government was in a complicated position. The systemic transformation was in full swing, the new multi-party system still in formation. On one side, new parties emerged from the transformed Communist Party and previous societal organisations (like the youth organisation) while, on the other side, new anti-communist parties were founded. The 1991 government was formed by parties belonging to the second camp. Initially, the form of privatisation to be adopted was the main issue of political contestation. There were those in support of a form of 'insider' privatisation, which would preserve domestic ownership. This form of privatisation was especially favoured by the directors of existing firms that hitherto held the type of social property. They could be viewed as aspirants to a domestic bourgeoisie. Significant segments of the anti-communist right wanted a strong rupture on the institutional and cadre levels and preferred a form of privatisation that instead would have benefitted foreign capital (Bembič 2018, 365 ff.). The external economic position was precarious. Foreign exchange reserves were low. The economic disintegration of Yugoslavia brought also considerable economic problems for Slovenian firms, notably those strongly geared to the Yugoslav market. Slovenian exporting firms tried to re-orient towards Western European markets. The government pursued restrictive economic policies, in particular a wage freeze, which were to facilitate enhanced exports.

In 1992, workers staged a massive wave of strikes. Workers in the big factories, which were markedly affected by the demise of the Yugoslav market, were particularly engaged in the strike wave (Stanojević 2010, 117). The main trade union federation – Zveza svobodnih sindikatov Slovenije (ZSSS) – organised a general strike against the wage freeze policy. Despite two other trade union confederations – Konfederacija novih sindikatov Slovenije (KNSS) and Pergam – boycotting the strike, it produced a strong response. The government had to abandon the wage freeze policy (Breznik and Mance 2020). It became evident that a viable price and wage policy needed to involve the trade unions. Already in 1991, the trade unions had also organised protests against the proposed privatisation model (Podvršič 2023, 115).

In 1992, a compromise was finally struck on the privatisation law that proved relatively favourable to insider privatisation and to keeping enterprises operable. "From the perspective of social convergence, insider ownership attenuated the socially disruptive of this transition [to a capitalist economy] and ensured socially more sustainable outcomes", states Bembič (2019, 335). Especially in

highly conflictive enterprises, workers could take a significant part of the shares. According to Stanojević (2010, 118), this helped to pacify the strike wave.

After the right-wing government had collapsed in the face of strong social mobilisation, the balance of political forces changed with elections held at the end of 1992. Liberalno demokratska stranka (LDS), with its roots in the youth organisation of later socialist times, became the politically hegemonic force. LDS was close to the interests of the emerging domestic bourgeoisie. At its first congress, it stressed the role of private enterprise and advocated a limited role for the state (cf. Zajc 2020, 264). In office, it pursued a policy of only selectively linking up with foreign capital. It preserved an important state-controlled banking sector, which acted as the very heart of the new Slovenian capitalism. LDS initially formed a broad coalition that also included key right-wing parties, including Socialdemokratska stranka Slovenije (SDSS), later renamed into Slovenska demokratska stranka (SDS), which was to become the main force of the political right in coming years.

The LDS-led governments were willing to cooperate with the trade unions (Stanojević 2020, 160). They viewed cooperation with the trade unions as potentially conducive for stabilising the economy and getting inflation under control. For restrictive wage policies, the LDS-led government was prepared to institutionalise neo-corporatist arrangements and through this give trade unions an institutionalised voice in economic and social policies (Bembič 2019, 335). In 1994, the tripartite Economic and Social Council (ESC) was established. Institutionally, concertation was facilitated by the relatively high level of centralisation on both the labour side – with one dominant trade union federation ZSSS – and the capital side where the Chamber of Commerce and Industry – Gospodarska zbornica Slovenije (GZS) could rely on obligatory membership. Differently from Austria, interest organisations were not intimately linked to political parties.

After 1994, several social pacts were concluded and the neo-corporatist groups were involved in drafting key legislation. The trade unions agreed to quite restrictive wage development –initially involving real wage losses. On the level of macro policies, the Slovenian government adopted complementary measures to prevent a currency revaluation. These measures temporarily included even a mild form of capital control. Nevertheless, wage policies with equalising elements – e.g., on the level of minimum wage policies – were also introduced. In the field of social policies, the trade unions were able to achieve some successes. The neo-corporatist organisations were systematically included in the drafting of legislation (cf. Bembič 2019, 335 f.; Breznik and Mance 2020).

Neo-corporatism was established in Slovenia at a time when its peak was already behind it in Western Europe. Stanojević (2010, 108) calls it “belated neo-corporatism”. It was put in place as a reaction to the labour militancy and trade union pressures, which were quite exceptional in the region. Trade unions suffered in the first half of the 1990s from lost membership – with trade

unionisation going down from 60% in 1992 to just over 40%. Unionisation then stabilised at that level and reached 42% in 2000 (Stanojević et al. 2023, 980, Tab. 26.1 and 990, Tab. 26.3). The emerging domestic bourgeoisie also saw key interests safeguarded because the economic and social situation as well as their own position were stabilised. The main political force of the 1990s was looking for a stabilising social compromise.

The key political and social forces aimed for the country to join the EU. As the accession talks progressed, some crucial requisites of the early transformation model started to erode because the national government gradually lost control over key economic instruments (like controlling capital flows; Bembič 2019, 338). This entailed a weakening of the fundamentals of neo-corporatism.

AFTER EU ACCESSION: THE EROSION AND CONTESTATION OF NEO-CORPORATISM IN SLOVENIA

Like in Austria, EU accession drastically reduced the scope for concertation policies and changed the balance of forces. Shortly after EU accession in 2004, the political balance of forces also changed. The right-wing SDS, which could be counted among nationalist right-wing forces with a strong neo-liberal profile with some conservative elements (cf. Becker 2018, 48 f.) was able to form a coalition government. In the area of economic policies, it pursued a radicalised neo-liberal agenda, e.g., a flat income tax.

The SDS-led government reduced consultation within the neo-corporatist arrangements and tried to unilaterally impose a package of far-reaching neo-liberal reforms. For example, it tried to push through the flat tax unilaterally. Faced with strong trade union protests, it had to abandon that proposal (Bembič 2019, 339).

During the SDS-dominated legislative period 2004 to 2008, a vital institutional pillar of Slovenian neo-corporatism was altered. In 2006, the obligatory membership of the Chamber of Commerce and Industry was abolished. This happened on the initiative of the government and against the explicit wishes of GZS. The SDS-led government explicitly wanted a systemic change in the organisation of business interests, taking the Anglo-Saxon countries as a model (cf. Skledar 2005; Breznik and Mance 2020). The key capital organisation side was weakened and started to operate on a partly different rationality. With a view to retaining existing members and gaining new ones, it radicalised its demands (Stanojević 2010, 131). Trade unions which encountered an increasingly heterogeneous labour force suffered a substantial loss of membership, especially in industry (Stanojević 2010, 131 f.). In 2005, the employers' organisations cancelled the encompassing private sector collective agreement leading to both lower coverage by collective agreements (about 70% in 2019; Stanojević et al. 2023, 997) and their decentralisation.

The post-accession high capital inflows stimulated a credit-led boom. In particular, the corporate sector took on high levels of credit. This produced a double

external vulnerability: high external refinancing of the banks and a considerable current account deficit. Due to these vulnerabilities, Slovenia was hard hit by the international financial crisis of 2008 and subsequent Eurozone crisis (cf. Kržan 2014).

Independent of their political orientation, Slovenian governments opted for orthodox economic policy responses to the double-dip crisis. The reactions to the eurozone crisis held much more lasting structural consequences. In exchange for consenting to state recapitalisation, the European Commission demanded the privatisation of the biggest banks. As an outcome, the major domestic banks came under the control of foreign capital (Podvršič 2023, 199 ff.). Since the state-controlled banking sector had been an key articulating and funding element for domestic capital, the role of domestic capital has become structurally weaker. Privatisations were not confined to the banking sector. The role of foreign capital generally grew in the Slovenian economy (cf. Podvršič 2023, 197 ff.). In addition, the segment of small companies expanded. As Stanojević and Furlan (2016, 17) point out, they face particularly strong competitive pressures and have vehemently advocated the flexibilisation of dismissals and lower taxes.

These changes have affected the capital side of the neo-corporatist arrangements. As then outgoing ZSSS President Lidija Jerkič noted in an interview with the weekly *Mladina*, considerable fragmentation on the side of the business organisations could be observed (Mekina 2025a, 38). Unlike Austria, the bilateral international Chambers of Commerce have taken on an increasingly visible role in shaping Slovenian economic policies. This is typical of peripheral dependent economies (cf. Delteil 2018).

In the face of crisis and the growth of precarious employment, trade unions have continued to lose members. Until 2019, the degree of unionisation had declined to 21% (Stanojević et al. 2023, 980, Tab. 26.1, 990, Tab. 26.1). De-unionisation has been much stronger in the private than in the public sector. The private service sector has been more affected by the loss of members than industry (Stanojević et al. 2023, 993 f.). Unions organised the last strong wave of strikes in response to the 2009 austerity measures (Stanojević 2020, 159 f.). During the strong social protests of 2012/2013, actors beyond the trade unions played a much more prominent role than in the 2005 protests against the Janša government. Trade unions have continued mobilisations on a smaller scale. “Since 2013”, however, as Breznik and Mance (2020) state, “trade unions have not been able to regain their past anti-systemic power”.

The double-dip crisis also led to major changes in the party system. The main political force of “national capitalism” vanished with the weakening of domestic capital. The orthodox crisis policies undermined the credibility of the liberal parties. Following the crisis, new liberal parties – conforming to the model of “light parties” with a focus on a leading personality, few members and a strong emphasis on marketing – proliferated. They have shown a pattern of a rapid rise and an equally rapid decline (Fink Hafner 2020). Some key personalities in these

new parties have had quite visible links to specific businesses (cf. Gašparič and Kustec 2020, 307). Even though parties like Stranka Mira Cerarja proclaimed a centre-left profile, their economic measures were right-wing neo-liberal (Fink Hafner 2020, 19; Podvršič 2023, 205). As regards the neo-liberal economic policy approach, there has been a considerable overlap between the strongly right-wing SDS and the new liberal formations. It is telling that some key cadre of SMC after the decline of the party joined SDS (Mekina 2025b). Differently from other countries in the region, a force on the left, Levica, also emerged from the social protests. It has concentrated on social issues (Podvršič 2023, 231). In the existing party spectrum, it is the closest to trade union positions. Since EU accession, the strongest political force has been the ever more right-wing-oriented SDS. After 2008, the party radicalised its anti-migrant stance. Unlike nationalist right-wing parties in Central and Eastern European countries outside the eurozone, like Fidesz and PiS, it has not developed heterodox policies and adheres to neoliberal orthodoxy (cf. Podvršič 2013, 214 ff.). Its approach to labour relations is neo-liberal and hostile to trade unions and neo-corporatism. It belongs to the nationalist political current that combines neo-liberal economic and social policy approaches with a strong anti-migrant position (cf. Becker 2018, 4 ff, 48 f.). Its political profile is very similar to FPÖ.

Since 2008, the approach taken by Slovenian governments has depended on both the economic situation and their political composition. During the financial crisis, the governments – independently of their political orientation albeit even more strongly in the case of the nominally centre-left government – marginalised the neo-corporatist arrangements. Bembič (2019, 343) states: “Social dialogue all but collapsed in 2008–2013”. Afterwards, the successive unstable liberal governments revived the neo-corporatist arrangements bringing about partial accords (Bembič 2019, 343 f.). An SDS-led government took over immediately after the beginning of the COVID crisis. In its crisis management, it relied on an *ad hoc* expert group. Tripartite consultation started late and remained quite marginal (Podvršič et al. 2020, 14). The following centre-left government led by Golob again reactivated neo-corporatist consultations. As former ZSSS President Lidija Jerkič shows, the business side uses the different approaches of the political forces strategically. It expects more from investing in government change rather than finding an agreement with the trade unions. “The employers’ side does not really need social dialogue”, Jerkič underlined in an interview with Mladina (Mekina 2025a, 38). Thus, business engages selectively in neo-corporatist negotiations. During the Golob government, which includes a minister from Levica in the key Ministry of Social Affairs and Labour, a pension reform was agreed on in the tripartite formula. While trade unions signed, a few of them publicly objected to the result (Trampuš 2025, 26). The support for neo-corporatist-based solutions accordingly is showing the first fissures on the side most favourable to neo-corporatism. Nonetheless, at the 2025 ZSSS congress the candidate favouring a strong focus on neo-corporatist negotiations prevailed at the

elections for the presidency of the federation (cf. Kocbek 2025, 4). Overall, the erosion of the neo-corporatist arrangements is more advanced in Slovenia than in Austria.

CONCLUSIONS

The broad *régulationist* approach with an emphasis on struggles over the strategic selectivity of the state and the role of political parties proved to be adequate for analysing the dynamics of neo-corporatism in Austria and Slovenia. In each case, the insecure political, economic, social and international circumstances played a role in instituting neo-corporatist arrangements. In Austria, both the key political parties and organisations of capital and labour shared a broad consensus for finding formulas conducive to concertation in the immediate post-war period. In a second phase, many of the trade unions strove for the firm institutionalisation of neo-corporatist arrangements. In Slovenia, workers' militancy and trade unions' demands led to the institutionalisation of neo-corporatist institutions. The main liberal political force had an accommodating role in establishing and institutionalising the neo-corporatist arrangements and practices. In both Austria and Slovenia, the labour side has been the main force striving for neo-corporatist arrangements. It has sought these arrangements in order to institutionalise its voice in economic and social policies. Thus, pro-neo-corporatist stances of labour have been a form of shaping the strategic selectivity of the state in its favour. In exchange, trade unions especially offered restraint on wage issues. In the initial phase of instituting and consolidating neo-corporatism, key forces of domestic capital likewise viewed neo-corporatism as a device for gaining institutionalised access to state economic and social policymaking, which would help to consolidate their position. Yet, the two neo-corporatist configurations differed in one vital aspect: In Austria, the interest organisations involved in the neo-corporatist arrangements have been closely linked to specific political parties – to ÖVP in the case of business and agricultural organisations, to SPÖ in the case of labour. In Slovenia, such organic links between organisations of capital and labour on one side and political parties on the other have not developed. This difference was to have a major impact on the evolution in the phase of eroding neo-corporatism.

In each case, the internationalisation of capital and EU accession talks weakened the neo-corporatist arrangements. EU accession fundamentally changed the strategic selectivity of the state in favour of transnational capital and to the detriment of labour. It also drastically limited the policy areas that could be covered by concertation practices on the national level. In both countries, capital forces aiming to weaken neo-corporatism grew stronger. For the first time, political parties openly hostile to neo-corporatism became major forces in governments. In Austria, FPÖ was this political force. The other right-wing party, ÖVP, has continued to be a terrain of a struggle between business forces defending and attacking neo-corporatism. Due to its organic links in ÖVP, the

pro-neo-corporatist Chamber of Business was able to preserve its obligatory membership and reshape the neo-corporatist arrangements to its own advantage. In Slovenia, SDS dismantled the obligatory membership in the Chamber of Commerce and Industry and thereby managed to alter the political dynamics on the capital side. The business side is now less inclined to neo-corporatism. Differently from Austria, incipient fissures regarding agreements negotiated in the neo-corporatist arrangement can be observed on the labour side in Slovenia. The erosion of neo-corporatism is more advanced in Slovenia.

The different roles of the parties are crucial for understanding these dynamics. Thus, political parties – and their different relationships to the organisations of capital and labour – matter for understanding the up- and downturn of neo-corporatism. In particular, they matter in the downturn. The strong links between the Chamber of Business and ÖVP have played a crucial role in preserving key institutional neo-corporatist arrangements. Pro-neo-corporatist business interests in Slovenia did not have such traction in the party-political camp. This facilitated the anti-neo-corporatist strategy of the main right-wing political force: SDS. Strong links between the interest organisations of capital and labour are, however, no guarantee for preserving neo-corporatism. How far they can be used depends on the concrete conjuncture in place.

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NEOKORPORATIVIZEM IN POLITIČNE STRANKE V SLOVENIJI IN AVSTRIJI

Povzetek. Članek proučuje vzpon, erozijo in izpodbijanje neokorporativizma v Avstriji in Slovenije iz regulacionistične perspektive, ki poudarja vlogo političnih strank. Članek pokaže, da imajo različni odnosi med ključnimi organizacijami kapitala in dela na eni strani in političnimi strankami na drugi strani ključen vpliv na različne dinamike izpodbijanja in nasprotovanja neokorporativizmu v obeh državah. Organizacije kapitala in delavstva v Avstriji imajo močne povezave s političnimi strankami, v Sloveniji pa temu ni tako. Te razlike so imele ključen vpliv v fazi, ko je neokorporativizem postal šibkejši. Povezave med organizacijami kapitala in delavstva na eni strani in ključnimi političnimi strankami na drugi strani so pripomogle k (negotovi) institucionalni stabilizaciji neokorporativističnih ureditev v Avstriji, medtem ko je ključni desničarski stranki uspelo destabilizirati ključni steber neokorporativizma v Sloveniji.

Ključni pojmi: neokorporativizem, Avstrija, Slovenija, politične stranke.

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RETHINKING THE NEO-CORPORATIST FRAMEWORK: THE CASE OF LONG- TERM CARE**¹

Abstract. *We examine the relationship between Slovenian neo-corporatism and the welfare state, focusing on long-term care. As corporatism is a struggle against capital, but within the structures of capitalism, it is unable to resist the extension of capitalist relations to the welfare state. However, this extension was expected to have only a limited impact on the public sector, namely increasing the quality and diversity of services. Our analysis shows that a market logic has prevailed throughout the sector. This has significantly reduced the influence of trade unions on the welfare state, which they exchanged for their subordination to capital.*

Keywords: *corporatism, long-term care, commodification, welfare state, labour migration, social spending, Slovenia.*

INTRODUCTION

In this article, we discuss the relationship between Slovenian neo-corporatism and the welfare state. According to the literature, corporatism – the shared governance of employers and workers – played a pivotal role in preserving the welfare state following the restoration of capitalism in the 1990s. However, both corporatism and the welfare state have since experienced crises. While corporatism is facing the exhaustion of industrial relations, the welfare state is encountering problems with access to social services. Although it cannot be argued that the weakening of corporatism is responsible for the crisis of the welfare state, the two crises are linked, and the aim of this article is to examine these links.

We start with corporatism. Even when it emerged in the Weimar Republic, the contradictions of corporatism were already apparent. While the workers' council movement demanded control over enterprises, corporatism only gained social

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ground after the movement was suppressed. This suppression was necessary to ensure that workers' influence over management remained within the confines of capitalist relations of domination. Similarly, after the Second World War, a consensus emerged between capital and labour. According to this consensus, the working class voluntarily subordinated itself to capital. In turn, capital agreed to legally limit exploitation and adjust wages to productivity (Supiot 2010). The class consensus entered a period of crisis in the 1980s. The unions have only been able to maintain it by making concessions (Baccaro and Howell 2017).

The emergence of Slovenian neo-corporatism in the 1990s followed a similar pattern, except that these turning points occurred in a shorter period. Slovenia adopted neo-corporatism as a reaction to workers' militancy during the early years of capitalist restoration (see Becker 2025, 867). The social partners reached a consensus whereby workers accepted the restoration of capitalism in exchange for the preservation of social rights and the welfare state. Just 20 years later, authors started to write about the exhaustion of industrial relations.

The trade unions demanded wage increases and improvements to working and living conditions, which presupposed the existence of a welfare state. Still, they did not insist that the welfare state exist in isolation from capitalist relations. Since the early 1990s, the welfare state has been opening to private capital, which was expected to generate new investment in social activities. It was thought that private investment would improve quality and increase choice, i.e., have a limited impact on public institutions. It was, however, not anticipated that private capital would be able to change the entire sector and transform the way it operates, making it more profit-driven. Assuming this to be the case, we suggest the crisis of the welfare state is the result of the expansion of capitalist relations into the realm of the welfare state.

To illustrate this, we use the example of residential care for older people, one of the activities of the welfare state. With this example, we show how the opening of public services to the market has allowed capitalist relations to penetrate the public sector. This example highlights the contradictions of Slovenian corporatism, which defends the welfare state declaratively while allowing capitalist relations to permeate the public sector.

The analysis must consider the international context as well. Due to the cross-border movement of goods, services, capital and labour, national social systems have become increasingly interdependent. This question is grounded in the theories of uneven and combined development (Trocki 1930/2017; Rosenberg and Boyle 2019) and dependency theory (Marini 2022). Both theories stress that the relationships between formally independent states are complex structures of subordination and exploitation (Marini 2022, 117). These processes thus also lie beyond the control of corporatist governance. In this paper, we use two factors to demonstrate the interconnectedness of social security systems: the transnational mobility of the workforce, and the growing disparity in the financial capabilities of welfare states.

The article addresses two central research questions, as examined in the subsequent analysis. The first question arises from the entry of profit-oriented actors into the public care sector. How has the public sector responded to the arrival of private capital in residential care for older people? In which way has this shift affected the relationships between private and public service providers, employees, and care recipients? The second question concerns transnational dynamics. It asks whether these relations also affect the Slovenian social protection system and, if so, how.

The structure of the article is as follows. First, the historical origins of corporatism and development of Slovenian neo-corporatism are discussed. The following section presents the methodology employed. The analysis commences by describing the processes in residential long-term care that have led to the commodification of services under the guise of public-private partnerships. The subsequent analysis explores the transnational dynamics between social security systems and their role in exacerbating transnational inequalities. The article ends with a discussion of the challenges faced by social policies in the context of the weakening of neo-corporatism.

ORIGINS OF CORPORATISM

The idea of corporatism originates from the Weimar Constitution of 1919. Article 165 granted workers equal participation with employers not only in negotiating wages and working conditions but also in the “general development of the productive forces”. Hugo Sinzheimer, a German Social Democratic legal scholar and one of the architects of the Weimar Constitution, interpreted this provision as the nascent form of *Arbeitsstaat*, or the workers’ state (Sinzheimer 1927, 5). According to Sinzheimer, the aim of the workers’ state was not to “dismantle large enterprises”, a metaphor that signalled it would not abruptly abolish the existing relations of production or expropriate capitalists as had happened in the Soviet workers’ state. Instead, he believes workers would achieve emancipation from subordination to capital if they held equal economic power to capital owners – that is, if they managed enterprises together with the holders of capital. During this process, workers would transcend their status as economically subordinate subjects and reconstitute themselves as “economic citizens” (ibid.). Sinzheimer cautioned that this transformation would require patience, wisdom, and social responsibility. Ultimately, however, the sharing of economic power would assure that national industry and commerce would no longer be governed by private individuals, and instead be guided by the “general will” of the economy. He referred to this vision as an “economic community” (*Gemeinwesen der Wirtschaft*) through which “the liberation of labour would be completed; wage labour would cease to exist, and the contractual worker would be replaced by the free citizen of the workers’ state” (ibid.).

In his essay *The Essence of Labour Law*, Sinzheimer concluded his discussion of corporatism with the evocative statement that “labour law carries within

it the vital current of social movements – the lifeblood of freedom”. His rhetoric prompts a return to the historical circumstances in which the Weimar Constitution arose in order to contextualise the origin of the corporatist idea. Historical studies reveal that, in the immediate post-First World War chaos – marked by shortages of raw materials and fuel – workers’ councils (*Arbeiterräte*) assumed control over factory management in many locations where owners were absent (Rachleff 2009; Weipert 2023). These councils ensured production continued and, in this regard, functioned as counterparts to the revolutionary soviets in the Soviet Union. Yet, unlike the soviets – composed of the proletariat – the German workers’ councils were largely dominated by the labour aristocracy, consisting of highly skilled technical cadre (Bologna 1972). Nevertheless, born directly from the turmoil of war, the workers’ councils embodied a subversive potential that the Social Democratic government sought to contain. The 1920 Workers’ Councils Act (*Betriebsrätegesetz*) curtailed spontaneous forms of workers’ self-management, granting the councils only “symbolic co-determination rights” (Rachleff 2009). The act was ultimately passed in the wake of violently suppressed protests when demonstrators demanded “the right to full control and co-determination” (Weipert 2023, 148).

A historical account of the context provides a more nuanced understanding of Sinzheimer’s concept of economic citizenship, which he developed 7 years after the Workers’ Councils Act was passed. It has become evident that even though the workers’ movement gave rise to the workers’ councils it was precisely the suppression of that movement that enabled the societal recognition of the councils. Recognition only came after their role had been reduced to ‘symbolic’ participation.

Slovenian neo-corporatism of the 1990s likewise emerged from a prehistory of the workers’ movement. Following Slovenia’s secession from Yugoslavia in 1991, trade unions clashed with the first conservative government led by DEMOS (Democratic Opposition of Slovenia) (Pernat Lesjak 2015; Grdešić 2006, 2008). The Confederation of Free Trade Unions of Slovenia (*Zveza svobodnih sindikatov Slovenije*, ZSSS) opposed the government’s plans for rapid and comprehensive privatisation. When Prime Minister Lojze Peterle presented the national privatisation plan in September 1991 – based largely on proposals by the American economist Jeffrey Sachs – 10,000 workers gathered in protest. The government was ultimately forced to relent, and endorsed a new privatisation law based on a compromise proposal formulated by Slovenian economist Jože Mencinger. Unlike many post-socialist European countries that implemented Sachs’s “shock therapy” (Bembič 2017), the Slovenian law envisaged a gradual approach to privatisation. In March 1992, ZSSS organised a general strike in opposition to the draft law on wage restraint, which the government had proposed as a measure to curb inflation. The unions demanded higher wages, collective bargaining rights, and job security. Although the strike was boycotted by the KNSS and PERGAM confederations, it still managed to mobilise as many

as 400,000 workers. The outcome was the withdrawal of the draft law. The following year, the government itself fell, and under the new administration, trade unions and employers' associations jointly established the Economic and Social Council (Ekonomski in socialni svet) in 1994 – a body that came to embody what was known as the “Slovenian social model” (Meardi 2007, 503–23).

Slovenian industrial relations have often been seen as an ‘exception’ compared to the weak unions and illusory corporatism in other post-socialist countries (Glassner 2013; Bohle and Greskovits 2012; Croucher and Rizov 2012; Crowley and Stanojević 2011; Meardi 2007). According to scholars, the strength of Slovenian trade unions helped in forming a robust system of social partnership that actively participated in shaping the country's social, economic, and particularly labour legislation. However, after the initial phase of ‘corporatist consolidation’ between 1994 and 2004, the alliance weakened following Slovenia's accession to the European Union and subsequent entry to the Eurozone. Ultimately, the social partnership entered a period of ‘exhaustion’ after 2013 (Breznik and Mance 2020; Stanojević et al. 2016; Stanojević 2015; Krašovec and Johannsen 2017). A wide range of evidence supports the thesis of exhaustion. The most visible indicator is the decline in membership rates in both trade unions (from an average of 44% in the first phase to an average 20.5% between 2015 and 2019; Stanojević et al. 2023) and employers' organisations (Krašovec and Johannsen 2017). The Economic and Social Council has also been increasingly paralysed by prolonged blockages: between 2020 and 2024, 41% of its operational time was lost due to a blockade caused by one of the social partners.

The first phase of ‘corporatist consolidation’ preserved the welfare state, establishing Slovenia as one of the EU's top performers in terms of social indicators. Nonetheless, favourable comparative statistics should not blind us to later transformations in the public sector. We will examine residential care for older people as an example of a public service that has undergone commodification in the last 30 years of Slovenia's independence. Commodification is understood here as a shift from the state providing public services to a market-based supply via public–private partnerships. Before presenting the analysis, we briefly outline the methodology we applied.

METHODOLOGY

The institutional analysis was guided by both secondary sources, including statistical data, academic literature, policy documents, sectoral reports from the region, and findings from our previous research, as well as primary interview data. This article draws on material collected as part of the research project *Transnationalisation of Care for Older People*. The study is based on three sets of qualitative interviews. First, we conducted 11 interviews with key stakeholders, including policymakers, directors of care homes, trade unionists etc. These interviews explored the underlying causes of care deficits in residential care. Second, we carried out 16 interviews with migrant care workers. The majority

were women aged between 25 and 55, originating from Bosnia and Herzegovina and Serbia, with two from Croatia and one from North Macedonia. The interviews covered working and living conditions, transnational family dynamics, and future aspirations. Third, we conducted eight interviews in BiH, the primary country of origin for migrant care workers in Slovenia, with experts and stakeholders involved in labour markets, care systems, and migration governance. Interviews lasted 30–90 minutes and were conducted with the informed and signed consent of participants. All interviews were recorded, transcribed, and subjected to thematic analysis.

INTRODUCING CAPITALIST RELATIONS INTO RESIDENTIAL CARE FOR OLDER PEOPLE

After separating from Yugoslavia, Slovenia began the 1990s as a socialist welfare state. In 1994, a neo-corporatist model of social dialogue was established (Filipovič Hrast and Rakar 2020; Stanojević 2015), paving the way for a social market economy. Thus, the introduction of capitalist relations was conditioned by a commitment to maintaining the welfare state (see Social Agreement for 1995). Social protection systems were based on mandatory, labour-related social contributions and universal social rights. Social funds were managed by independent institutions, while the state provided services and social benefits. The emerging social protection system adopted the continental mixed welfare capitalism model in which social security is assured via the combined efforts of the state, market, family, and non-governmental sector (Kolarič et al. 2009).

In the early 1990s, the Slovenian sector of residential care for older people comprised 53 public care homes, accommodating 11,260 users (Hlebec and Mali 2013, 31; Hlebec and Rakar 2017, 37). As early as 1992, the Social Security Act (Zakon o socialni varnosti – ZSV) enabled the inclusion of private providers through a licensing scheme (concessions), albeit this did not lead to any significant expansion of private service provision. A more active promotion of the private sector began in 1999, initiated by the Ministry of Labour, Family and Social Affairs (Court of Audit 2008, 20). Drawing on the Lisbon Strategy, the Resolution on the National Social Protection Programme for 2006–2010 (ReNPSV06–10 2006, 3) set the goal of creating a “deregulated, decentralised and de-bureaucratised” state, with the provision of care for older people to be delegated to an “entrepreneurial public–private network of organisations”. The same document specified that private investment in residential care infrastructure must reach 60% of total funding for reasons of “rationalisation of public expenditure”. The Public–Private Partnership Act (2006) further stipulated that public–private partnerships were mandatory for investments exceeding €5.2 million. Throughout this period, social partners campaigned for public services to be efficient, of high quality, and accessible, as stated in the last Social Agreement for 2015–2016.

Analysis of policy documents shows the main developmental goals. Following the state’s decision to reduce investment in residential care, it started

to encourage private service provision to increase facilities and respond to the growing demand. The private sector was also expected to contribute to “higher quality” services. At the same time, all key resolutions on national social protection (ReNPSV06–10, ReNPSV13–20, ReNPSV22–30) have consistently stressed the replacement – or deinstitutionalisation – of residential care via the development of supports for independent living (e.g., home-based assistance) and community-based services (e.g., group housing). Within the logic of these policy resolutions, residential care is framed as a developmentally obsolete model, incompatible with “contemporary concepts of social work” (ReNPSV22–30 2022, 16). Accordingly, ReNPSV22–30 (2022, 29) anticipates a gradual reduction in residential care, to be reserved exclusively for “older persons with dementia and complex health needs”. This developmental model not only precludes any possibility of qualitative improvements in residential care, but it reinforces the stigma associated with this form of care – namely, it portrays it as a hospice, total social institution. Further, it legitimises the state’s withdrawal of funding for public residential care, while justifying the private, profit-driven sector.²

Private investors seized the opportunity, leading to a rapid rise in the number of private care homes – from 5 in 2001 to 40 in 2015 (Hlebec and Rakar 2017, 39). By 2023, there were 6,247 beds in private homes (48 providers), 13,463 beds in public homes (59 providers) and an additional 2,300 beds in specialised institutions (SSZS, Highlights from the 2023 analyses). The total number of users rose from 11,260 in the early 1990s to 22,735 by 2022 (source: SURS, Si-Stat). In the course of three decades, the number of users doubled – chiefly due to private investment.

Response of the Public Sector to the Market-Driven Supply of Care

To safeguard service quality and affordability, the state incorporated private providers into the “public care network”, meaning that private companies must obtain a concession, comply with public service standards, adhere to state-regulated price calculations, and abide by the collective agreement for the social and health care sector. However, in order to incentivise private investment the state allowed residential care fees paid by users to include loan-servicing costs – up to 60% of the value of fixed assets at the general interest rate. This was one reason that care in private homes cost 28% more than care in public ones (Court of Audit 2019, 5). Although private concession holders are legally prohibited from appropriating profits, some companies already attempted to challenge this rule before the Constitutional Court – a case they withdrew under

² It is naïve to assume that the private sector operating in social care is non-profit merely because Article 41a of the Social Security Act stipulates that social welfare activities must be conducted on a non-profit basis. As media investigations have pointed out, surplus extraction can occur through mechanisms other than profit appropriation – such as loan agreements (Cirman and Modic 2024) or the acquisition of private educational institutions (Svet24.ur 2024).

public pressure.³ According to Marko Slavič, director of the Danica Vogrinec Care Home, the state has created a form of “unfair competition” between the public and private sectors. The government withdrew public investment while failing to grant it “entrepreneurial autonomy” – such as the ability to take out bank loans – thereby placing it at a structural disadvantage (Jager 2019).⁴ On the other hand, the president of the Association of Social Institutions (Skupnost socialnih zavodov Slovenije, SSZS) publicly called for public institutions to be restructured into public enterprises, hence formally adopting a market-oriented model (Dnevnik 2014).

Despite public and private care homes being expected to operate within the “public care network”, the entry of private providers has significantly impacted the way public homes function. Most private care homes were built after 2000. These facilities are of a high standard, equipped with modern amenities and smaller than public care homes. They predominantly offer single or double rooms. This has starkly highlighted the infrastructural obsolescence of public care homes, which are in dire need of investment – yet the state has largely withdrawn from financing public residential care. This situation has forced public care homes to generate their own income for investment. According to annual reports of the Association of Social Institutions between 2008 and 2023, just 19% of total investment in residential care came from the state, another 19% from private investors, while a striking 60% was financed directly by public care homes themselves (source: SSZS, own calculations). Notably, until 2021, the state’s share was even lower – just 14%. A substantial increase occurred only in 2022 and 2023 when the Ministry for a Solidary Future considerably boosted investment in public care homes. In fact, 61% of all state investments between 2008 and 2023 were concentrated in these final 2 years. Public care homes funded these investments via ongoing operations – drawing from depreciation funds and operating surplus. Between 2009 and 2023, public and private homes generated a similar average annual level of investment of around €1,800 per bed. Still, the average for private providers includes loans from the 2008–2012 period, accounting for over 70% of all private-sector investment. Excluding this initial investment cycle, public homes invested almost €1,900 per bed, compared to just €700 per bed in private homes. This figure reveals the extent to which public institutions have relied on their operating revenue to finance investments.

We must ask how it has been possible for care homes to generate such significant surpluses. First, the revenue structure shows that 60% of funding comes

³ It is important to recall the ruling of the Constitutional Court which, following a petition by private physicians and dentists, held that private companies operating within the public network are permitted to make a profit. The Court reasoned that prohibiting this would violate their entrepreneurial freedom (Constitutional Court U-I-194/17, 15 November 2018, Official Gazette of the Republic of Slovenia, No. 1/2019). A similar decision was made in the case concerning private pharmacies.

⁴ In 2018, it received the award for the best care home in Europe from the European Association for Long-Term Care. This shows that public residential care homes can match and even exceed the quality standards of private ones.

directly from users and their families, who pay for care services. As a result, the burden of investment has largely been shifted onto users, with the state effectively transferring responsibility for the development of residential care onto them. Second, the wages of core frontline staff – care assistants, cleaning and support staff – barely exceed the statutory minimum wage. Third, management can resort to various strategies to increase labour intensity and reduce staffing levels, inevitably at the expense of working conditions and service quality. Altogether, these factors suggest that institutional surpluses have primarily been achieved by way of reductions in both labour standards and care quality – borne by workers and users alike.

The requirement for public care homes to finance their own investments has led to the diffusion of capitalist logics throughout the entire care sector, prompting public providers to adopt market-oriented behaviour. The arrival of private providers was not simply an addition to diversify service provision; it altered the entire field, steering it toward commodification. Simultaneously, the relationships between the state, management, employees and users were transformed in line with capitalist relations of production. These changes are increasingly reflected in tensions: between management and employees on one side, and between service providers and users – now reconceptualised as consumers – on the other. The section below delves into these dynamics in greater detail, exploring factors such as working conditions, service quality, and accessibility of care.

Working Conditions, Quality, and Accessibility of Care

Care workers and support staff are concentrated in the lowest wage brackets, typically earning around €1,000 per month – entry-level workers even less. The most recent wage reform eliminated the practice of counting bonuses in the minimum wage by equalising the base and statutory minimum wage. Yet, despite chronic staff shortages, these professions remain at the bottom of the pay scale.

In care homes, work is organised in three shifts, seven days a week. From Monday to Friday, shifts are often shorter than 8 hours, allowing the 40-hour weekly quota to be distributed over the weekend. Most personal care is provided in the morning, resulting in minimal staffing needs during afternoons, while long night and weekend shifts typically last between 10 and 13 hours. Public care homes tend to more strictly adhere to the legal limits on overtime (Hrženjak and Breznik 2024a). They do not pay overtime; instead, accumulated hours can be taken as days off – yet this is often not possible due to persistent understaffing. Private care homes, in contrast, allow and compensate for more overtime hours, enabling higher take-home pay. In this way, the flexibility of private homes translates into higher wages – but only by means of longer working hours. Workers may thus surpass the €1,000 threshold, but at the cost of extensive overtime. While employees in public homes are effectively trapped in low-wage positions, those in private homes are subjected to a pace-driven regime that offers marginally better pay in exchange for unsustainably long working hours.

In our interviews, a migrant care worker described her typical workday. Together with a colleague, she was responsible for 42 users during the morning shift. This included a 5–7 minute morning hygiene routine per person, 5 to 6 more thorough hygiene procedures per day, assistance with feeding, distribution of medication, transferring users from bed to wheelchair and back, as well as real-time documentation of care tasks (number of baths, bedding changes, feeding support). The more thorough care routines consist of bathing, shaving, nail clipping, changing clothes and bedding, helping users sit up, and preparing toilet facilities. The interviewee noted that she is allotted 25 minutes per person for this level of care, even though, according to our interview with the Association of Social Institutions (SSZS), such care should require at least 40 minutes.

The intensification of labour not only degrades working conditions but also has a negative impact on the quality of services and living conditions of service users. The interviewee reported that, upon arriving at work, she often finds residents thirsty because nobody was able to help them drink. Some residents needed encouragement or attention to stop them from refusing food, yet staff often did not have enough time to provide this. If users had no family members to visit them, they could not go outside for fresh air as there were never enough staff to accompany them.

At the same time, access to residential care has also declined. The statistics provide compelling evidence of this decline. Until 2009, the cost of care was lower than the average pension. Since 2010, however, the average cost of residential care has exceeded the average pension. In 2023, this difference was 13% (SSZS 2023). Some service users have been forced to seek cheaper residential care in neighbouring countries due to unaffordability, as has been observed in Croatia (Hrženjak 2025). Conversely, poor working conditions have prompted employees to seek employment opportunities in other sectors or countries where wages are higher and conditions are more favourable.

These brief yet revealing data show that working conditions, care quality, and accessibility of services have spiralled out of control. Their ‘flexibility’ is now determined by two opposing forces: the purchasing power of users on the one side, and the imperative to generate surplus on the other.

The contradictions arising from the commodification of care services are exacerbated by international pressures. In the following section, we discuss two factors that create reciprocal effects between countries: labour migration and the growing disparities in the financial capacity of welfare states.

THE INTERCONNECTEDNESS OF NATIONAL SOCIAL SYSTEMS

Alongside the regulated inter-state influences by means of imitation or European policy convergence, cross-national influences also arise in more unregulated forms. The repercussions of the internal organisation of social systems may extend beyond national borders, potentially influencing the social welfare systems of other states. This dynamic is especially visible in the transnational

labour migration: some countries generate care labour shortages while others export it to those experiencing deficits. The conventional explanation for this refers to the growing proportion of older populations in developed countries for whom care needs can no longer be met with available local labour. Below, we argue that the internal architecture of national social protection systems also plays a significant role in producing these labour shortages.

Our comparative analysis of long-term care systems in Germany, Austria, Slovenia and BiH shows how different welfare regimes – representing core, semi-peripheral and peripheral contexts (Arrighi and Drangler 1986; Viera 2018; Morales Ruvalcaba 2020) – are interconnected by a migration chain that channels care workers from poorer to wealthier regions of Europe. In Germany and Austria, along with the home-based and residential service provision, long-term care systems heavily rely on cash-for-care allowances introduced in the 1990s, which were designed to enhance user choice but in practice incentivise home-based arrangements. This has created a vast market for live-in migrant workers who provide live-in 24-hour care in private households. It is estimated that Germany hosts around half a million migrant care workers, most of whom are employed informally. Meanwhile, Austria has introduced a home-based care system involving tens of thousands of migrants, who rotate every 2 weeks. These migrants are self-employed “personal caregivers”, mostly from neighbouring countries. Both systems disincentivise residential care, sustain marketisation, and contain costs through dependence on migrant labour (Safuta et al. 2022; Österle and Heitzmann 2020, 34; Hegelich and Meyer 2009; Österle 2013, 2018; Trukeschitz and Schneider 2012; Theobald and Hampel 2013).

In Bosnia and Herzegovina, the absence of comprehensive public provision has fostered a fragmented and largely unregulated private sector. The state devotes a very small share of GDP to social protection, leaving public services limited and regionally uneven. Costs of institutional care far exceed local purchasing power and are often financed through remittances from emigrants. Private providers dominate, yet the majority of residents cannot afford their services. Private facilities capitalise on the fact that many emigrants seek institutional care for their ageing parents. In this rapidly expanding private sector, 80% of all placements are occupied by people whose care is financed by children living abroad (UN Women 2023, 46). As an outcome, the cost of care has far exceeded the purchasing power of the local population (UN Women 2023, 46). Combined with widespread poverty, unstable governance and a deteriorating economic situation, these conditions fuel mass emigration, including of nurses and care workers, who seek employment in Germany, Austria, Slovenia, and beyond (UN Women 2023; Efendić 2021; Jakovljević et al. 2021).

In Slovenia, by contrast, care for older people is torn between the family and care homes. Residential services are underfunded and marked by poor working conditions and low wages, staff shortages, long waiting lists, and widespread reliance on informal or grey-market solutions. Rather than addressing these

structural weaknesses, the state supports the importing of migrant labourers from post-Yugoslav countries and beyond. In contrast, Slovenian care workers emigrate to Austria, where cash-for-care systems allow for higher wages (Hrženjak and Breznik 2024b).

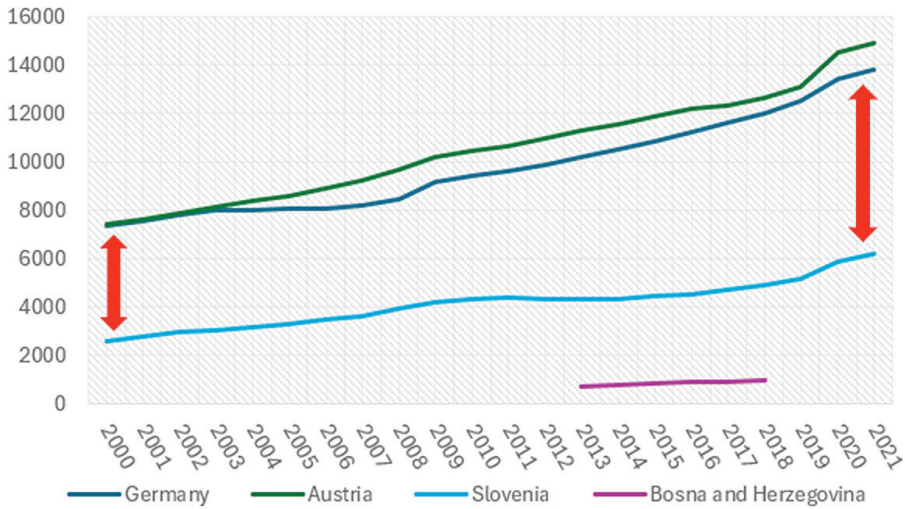
Despite the chronic shortage of care workers, Germany and Austria are promoting home-based care at the expense of residential care. Yet, this approach is inefficient in terms of labour deployment, particularly for 24-hour care, since it increases demand for labour. The high proportion of migrant care workers from Eastern Europe in both countries suggests that these care models can only be sustained by attracting workers from neighbouring (semi-)peripheral countries. Although they receive low pay and work under precarious conditions, structural economic inequalities between states guarantee a continuous inflow of workers. This extractive reliance on care labour from the (semi-)periphery (Uhde and Ezzeddine 2021) affects social protection systems in sending countries by producing local care and labour shortages, thereby adding to the “care crisis” (Fraser 2017).

Taken together, these dynamics demonstrate how the uneven development of long-term care systems across the region sustains transnational flows of care labour from the periphery and semi-periphery to the core. When combined, these systems reproduce relations of subordination between welfare states. This statement can be further substantiated by comparing social spending on social protection across four countries.

Growing Disparity in the Financial Capabilities of Welfare States

The developments described above are unfolding in an international context best understood via the lens of uneven and combined development (Trocki 2017 [1930]; Rosenberg and Boyle 2019). National welfare systems evolve unevenly, depending on different economic foundations. They not only have uneven conditions for developing social protection architectures, but these gaps can also widen over time. This becomes evident when comparing Eurostat data on social protection expenditures in four countries – Germany, Austria, Slovenia and BiH – between 2000 and 2021. In this period, Slovenia reduced its relative gap in social protection expenditure vis-à-vis Austria from 35% to 42%. However, its absolute gap rose from €4,827 to €8,709. A similar pattern appears in BiH (for which a shorter data series is available): between 2013 and 2018, the relative gap shrank from 7% to 8%, while the absolute difference grew from €10,563 to €11,688. In short, while Slovenia and BiH are reducing their relative differences with Austria and Germany, the absolute differences continue to grow – as illustrated by the red arrows in the figure. These arrows, placed at the beginning and end of the data series, capture a snowballing effect that reinforces structural divergence.

Figure 1: TOTAL EXPENDITURE ON SOCIAL PROTECTION PER CAPITA (IN CURRENT EUR) (EUROSTAT)



Source: Eurostat, ESSPROS, Total expenditure on social protection per head of population.
 Note: We also conducted a test using 2010 constant prices, which yielded a similar outcome, albeit with smaller variations.

The snowball effect shows that, despite higher levels of economic growth, countries like Slovenia – and especially BiH – can only reduce their *relative* gap in social spending, while the *absolute* gap continues to grow. Consequently, these countries have fewer resources available to develop their welfare states and are becoming comparatively poorer. Wealthier countries have more fiscal freedom and, ultimately, access to a large pool of care workers from Eastern and Southern Europe. Germany and Austria can sustain 24-hour home-based care because they recruit migrant care workers from neighbouring countries where care systems suffer from low wages and poor working conditions. In contrast, Slovenia, as a semi-peripheral country, struggles to compete for care labour with core countries that offer substantially higher wages and more generous social benefits. Meanwhile, in a peripheral country like BiH, care services for older people are largely viable only within transnational families – particularly those with members working abroad. This dynamic reinforces transnational care inequalities: while core countries are able to realise ideals of “ageing in place”, (semi-) peripheral states face growing pressures toward the familisation of care, driven by workforce shortages and the retrenching of public services. These trends, spurred by the commodification of care, not only widen the care divide but additionally deteriorate working conditions and the quality of elder care in Europe’s (semi-)periphery.

DISCUSSION AND CONCLUSION

This article began with Hugo Sinzheimer, the intellectual architect of corporatism, so as to highlight the gap between the rhetoric and institutionalisation of corporativism. Concurrent historical struggles help us understand that corporatism could only be integrated into systems of governance once the workers' movement had been suppressed. This made sure that corporatism remained confined within the structures of capitalism, preventing it from exceeding those bounds. This argument is powerfully illustrated by Zoe Adams' insight that corporatism can at best limit exploitation, because class struggle "within capitalism is labour's struggle against capital, but within the structures of capitalism" (Adams 2021, 443–44). Her formulation is confirmed by the Slovenian trajectory, which led from a vibrant workers' movement in the early 1990s to the institutionalisation of corporatism in 1994 and its subsequent evolution – from a period of "corporatist consolidation" to a phase of "corporatist exhaustion".

In the consolidation phase, the class contract guaranteed the maintenance of the welfare state. However, the EU, into which Slovenia was integrating, had already begun to transform the welfare state from a framework of "public services" into "services of general interest", blurring the boundary between public and private. Under the influence of European integration and international organisations, the Slovenian welfare state gradually yielded to private interests – including, as we have shown, in the field of long-term care. Expectations that the private sector would simply expand facilities and enhance service quality proved to be naïve. Instead, the blending of public and private providers led to the covert transformation of the welfare state. The entry of private, profit-oriented actors into residential care impacted the public sector itself, spreading the effects of commodification across the entire field. Capitalist production began to operate as a "specific kind of production which predominates over the rest" as a "general illumination which bathes all the other colours and modifies their particularity" (Marx 1973, 106–107). Once profit-driven private providers entered the public long-term sector, social partners lost control over the system. As we have shown, it started operating under market logic, ultimately resulting in extreme work intensification, low wages, high staff turnover, labour shortages, and a general decline in the quality of care.

These were not the only unintended consequences impacting the field. Socio-economic integration has increased the interdependence of national social protection systems. This article examined the characteristics of social systems across a regional constellation composed of both 'old' and 'new' EU member states, as well as a candidate country: Germany, Austria, Slovenia, and BiH. Our central thesis was that labour shortages in long-term care are not caused solely by population ageing, but also by the internal structure of national welfare systems. Our brief comparative analyses revealed that the German and Austrian systems, which incentivise 24-hour home-based care, absorb care workers from (semi-) peripheral countries – workers who, due to poor working conditions and low

wages in their home countries, seek employment abroad. These systems remain affordable from a labour perspective because they draw from a readily available pool of care workers in surrounding countries, where wages are lower. However, this extractive dynamic not only sustains care systems in core countries; it also transfers the unintended effects of their welfare policies across borders. The externalisation of care deficits creates transnational feedback loops that intensify labour shortages and care gaps in the sending countries.

A comparison with Germany and Austria points to key challenges facing Slovenia's present long-term care reform. In those countries, policies promoting home-based care contribute to labour shortages in the care sector by shifting responsibility onto families – many of whom are unable to provide care themselves and therefore turn to informal arrangements, often hiring migrant women for around-the-clock care. Slovenia is also promoting home care, primarily through mandatory long-term care contributions and services delivered by public or private providers. While this model differs from the cash-for-care systems in Germany and Austria, it similarly generates increased demand for care workers. In response to the persistent labour shortages, Slovenia plans to import care workers, as indicated by a recent bilateral employment agreement with the Philippines. The viability of the Slovenian long-term care model thus hinges on access to low-cost labour and the extractive recruitment of workers from peripheral regions – placing Slovenia among welfare states whose care regimes risk reproducing, if not intensifying, global inequalities.

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RAZMISLEK O NEOKORPORATIVISTIČNEM OKVIRU: PRIMER DOLGOTRAJNE OSKRBE

Povzetek. V članku obravnavamo odnos med slovenskim neokorporativizmom in socialno državo, pri čemer se osredotočamo na dolgotrajno oskrbo. Ker je korporativizem boj proti kapitalu, vendar znotraj struktur kapitalizma, se ni mogel upreti širjenju kapitalističnih odnosov v socialno državo. Vrh tega se je pričakovalo, da bo širitev imela omejene učinke na javni sektor, da bo zgolj povečala kakovost in raznolikost ponudbe. Naša analiza pokaže, da je v resnici vsilila tržno logiko celotnemu sektorju. Tako so si sindikati zmanjšali vpliv na socialno državo, ki so jo ob vzpostavitvi korporativizma menjali za svojo podreditev kapitalu.

Ključni pojmi: korporativizem, dolgotrajna oskrba, poblagovljenje, socialna država, delovne migracije, socialni izdatki, Slovenija.

Nina VODOPIVEC*

FROM SELF-MANAGEMENT TO POSTSOCIALISM: INDUSTRIAL WORKERS' SILENCED EXPERIENCES OF DISPOSSESSION IN SLOVENIA**¹

Abstract. The article explores post-socialist political and economic transformations in Slovenia through textile workers' experiences. Drawing on long-term ethnographic research, a gap is revealed between dominant macroeconomic narratives and everyday experiences of being dispossessed. It is argued that self-management constituted a political economy rooted in collective labour, long-term sacrifice, and shared investment in socially owned property. Postsocialist restructuring dismantled the institutions and the material world people had built together. Deindustrialisation thereby functioned as structural violence, erasing class conflict from public discourse, and concealing the historical, social and affective dimensions of dispossession.

Keywords: industrial labour, postsocialism, dispossession, moral economy.

INTRODUCTION

In this article, post-socialist industrial restructuring in Slovenia is explored by shifting the focus from macroeconomic indicators to industrial workers' experiences, particularly in the textile sector. While macroeconomic measures indicated a successful transition (Mencinger 2001; Ferfila and Phillips 2010), production workers expressed material and symbolic impoverishment, the devaluation of both their labour and themselves. The narrative of a "successful transition" was not neutral. It erased social conflict, legitimised new power relations, in turn silencing the voices of workers, dismissing them as outdated and nostalgic, while framing their suffering as a necessary price of progress.

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To challenge this framing, the article considers long-term ethnographic research (2002-present), with a focus on the closure of the Mura textile factory in 2009. It highlights emotional and social dimensions of economic transformation and argues for an anthropological understanding of the economy as socially embedded, shaped by values, norms and social relations, and not just markets and institutions. Workers' experiences of deindustrialisation reflect broader struggles over their value, recognition and belonging. Their claims of injustice are not backward-looking, and instead articulate ongoing social conflict and demands for the recognition of labour and structural dispossession.

The article delves into how these experiences have been interpreted, silenced or delegitimised in public discourse. It is argued that workers' loss should be understood as dispossession, a form of structural violence that has stripped them of their livelihoods, political agency, and the material foundations of their life; namely, what they managed to establish through collective labour in self-management.

While industry still employs nearly one-quarter of the workforce (Slovenska industrijska strategija 2021, 7), entire regions and sectors, notably the textile industry, have almost vanished. Even where it remains, workers describe a profound sense of decline, the erosion of working-class communities and severing of ties between factories and local areas.

To understand these complex experiences, the article takes an emic methodological approach to deindustrialisation, grounded in the experiences of those affected. Analytically, however, deindustrialisation is not considered to be an endpoint. It is a contested and uneven process, influenced by global capital, cycles of investments and disinvestment, and shifting geographies of development (High et al. 2017; Smith 2008; Vaccaro et al. 2016).

The article thereby contributes to anthropological and interdisciplinary debates on the affective and embodied dimensions of deindustrialisation and the structural violence of economic transformation (High 2021). It builds on post-socialist scholarship that critiques transition discourses as political and technocratic, and rooted in global circuits of power and capital (Burawoy and Verdery 1999; Kalb 2000; Podvršič 2023). Deindustrialisation studies that trace the long-term consequences of industrial decline on affected communities are also considered (Cowie and Heathcott 2003; Linkon 2018).

This article does not refer to all industrial workers in Slovenia, nor claim that the textile sector is representative of the whole industrial sector. Differences shaped by age, gender, class, region and ethnicity are acknowledged, while focus is given to a shared "industrial structure of feeling" (Bonfiglioli 2019; Byrne 2002; Strangleman 2012), formed from socialist industrialisation and self-management, which continues to impact workers' perceptions of dignity, value and loss. To grasp these experiences, the article explores the historical moral economies impacted by this structure of feeling and the transformations brought about by postsocialism and neoliberalisation.

The first section of the article outlines the methodological approach adopted. The second section investigates dominant narratives which have silenced workers' experiences. The third section presents a personal account of deindustrialisation to stress its emotional and embodied dimensions. The fourth section turns to the historical experience of factory labour and the socialist moral economy. In the final section, dispossession is explored as structural violence.

METHODOLOGY

The article is based on long-term ethnographic and historical research, including participant observation, in-depth interviews, and informal conversations with textile workers. Workers' subjective experiences are viewed as being socially situated and historically shaped. The material is not analysed through the decoding model since the analysis follows an ethnographic methodology, which emphasises interpretive and iterative engagement with the full body of material (interviews, life stories, fieldnotes). These are treated as situated accounts embedded both in each other and within broader historical, social and affective contexts, rather than isolated texts. The article also draws on social memory studies (e.g., Connerton 1989; Portelli 1991) to look at how workers' narratives – marked by the past, informed by the present, and oriented to imagined futures – are relational and context-dependent. Accordingly, the analysis does not treat memories as reflections of a fixed past or evidence of historical 'truth', but focuses on the meanings that emerge in contemporary contexts where anticipations of the future intersect with what Raymond Williams called "structures of feeling", that is, historically specific modes of feeling a particular period. The analysis thus underscores contextualisation and reflexivity with a view to understand how workers navigate competing ideologies and make sense of their experiences. The aim is not to seek a single, unified account but to highlight the multilayeredness of workers' narratives together with the tensions, ambiguities and contradictions that arise through lived experience.

Most of the interlocutors were women given that they formed the majority of the textile workforce in production. However, men were also interviewed, including foremen, maintenance workers, managers, office workers, and retired, laid off, or still employed professionals. The research began in 2000 in Maribor, a city then strongly affected by industrial decline. The initial contact was unplanned. While working at the Technical Museum of Slovenia, the author was approached by the Tabor textile factory which was offering to donate some machinery. When visiting the factory, the author was struck by the workers' deep sense of belonging, which profoundly shaped the future direction of the research.

Between 2000 and 2024, the author conducted interviews in various textile factories – some already closed (e.g., IBI, BPT, Svila, MTT, Mura, Tekstilana), some in the process of shutting down (e.g., Jutranjka, Delta (Ptuj)), and others still operating at the time of research (e.g., Novoteks and Induplati before their bankruptcy, Predilnica Litija). The author revisited several interlocutors over the

years. In addition to interviews, the research draws on minutes of workers' council meetings (Dekoratívna and Pletenina, Ljubljana), local and national newspapers, factory bulletins, magazines, and film footage from archives of the national broadcaster RTV.

INDUSTRIAL WORKERS AND THE POLITICS OF POSTSOCIALISM

The dominant macroeconomic and public discourse in Slovenia has long framed the postsocialist transition as a largely successful process defined by democratisation, privatisation, stabilisation, and limited foreign ownership. Rooted in modernisation theory, this perspective assumes a progressive, linear shift from socialism to liberal democracy and capitalism. Socialism is portrayed as repressive and inefficient, while the transition appears to be natural and necessary. The collapse of Yugoslavia is hence attributed to internal failure rather than global economic restructuring.

The mentioned perspective has shaped public, policy and academic debates. Since this article draws primarily on research in history, sociology, and especially anthropology, the following remarks are limited to these fields. Early historiography focused on political democratisation, privatisation, and national sovereignty, yet rarely questioned the implicit assumption of the transition paradigm that democratisation and market liberalisation were necessary, inevitable, and progressive breaks from socialism. Such a framing obscured the social and cultural dimensions of socialism and the complex experiences of dismantling it. More recent scholarship has broadened the picture by examining diverse actors, political multiplicity, and social conflict. Nevertheless, it has still not directly confronted the ideological assumptions of transition discourse, particularly regarding class and dispossession.

Industrial sociology tends to prioritise labour policy, labour market participation, and trade unions, while pushing aside those excluded from the new order. Anthropology and ethnology in Slovenia drew on international postsocialist studies and have made some interventions by challenging the dominant macro narrative and foregrounding everyday life². Yet, attention to class and the political economy of labour has largely been sidelined in favour of identity, nationalism and migration.

Since the late 1990s, international scholarship on postsocialism has regarded transition as a politico-economic project embedded in global capitalism and development paradigms, challenging its apparent neutrality. Rejecting linear notions of progress, it has highlighted ruptures, continuities, and unequal power relations (Burawoy and Verdery, 1999; Kalb 2000). This article aligns with such a critique by considering industrial workers and deindustrialisation. It shows how the transitional discourse in Slovenia based on a post-industrial paradigm

² On the development of postsocialist studies in Slovenia, including the post-Yugoslav space, see Petrović 2015.

developed with an antisocialist orientation, casting industrial labour as backward, and legitimising new hierarchies.

Following EU accession in 2004 and the Lisbon Strategy, neoliberal discourse has come to dominate development agendas, labour and social policy, and public debate, reinforcing earlier technocratic and depoliticised logics. Accentuating self-responsibility, flexibility, and entrepreneurship, these frameworks further obscure structural inequalities, shift risks over to individuals, and weaken collective agency. Vulnerability is reframed as a personal failure (Kovačič 2008; Leskošek 2011³), reshaping institutional practice and workers' self-perception.

Despite these powerful discourses that individualise the effects of economic transformation and the social and emotional consequences of deindustrialisation, the topic remains largely underexplored. Macroeconomic explanations stress the loss of Yugoslav markets, restructuring failures, and global competition, while neglecting the lived effects on workers and their communities. Deindustrialisation is framed as natural and complete.

This view draws on the post-industrial paradigm, which assumes an unproblematic shift from manufacturing to a knowledge economy. Like transition discourse, it presumes a total break with the past and the beginning of something entirely new, obscuring persistent inequalities and the afterlives of industrial labour, traces that endure in memory, infrastructure, and social ties (Vaccaro et al. 2022). The paradigm also overlooks that manufacturing has not disappeared, but transformed.

In Slovenia, the post-industrial paradigm became institutionalised during the late 1980s and early 1990s, tied to market reforms and a clear antisocialist stance. Industrial labour and the working class became associated with the discredited socialist past, while managerial and entrepreneurial knowledge was promoted as modern and future-oriented. This shift reconfigured social hierarchies, valorising cognitive and managerial work and devaluing manual and industrial labour, in turn reinforcing new exclusions.

These frameworks obscured the ongoing social consequences held by factory closures and industrial decline. For the workers interviewed in this study, deindustrialisation was not a past event, but an ongoing disruption. Linkon's (2018) metaphor of deindustrialisation as "radioactive waste" highlights this aspect by showing that even when workers do find new jobs the absence of the factory continues to shape their values and futures. Walley's (2012) account of her father's layoff captures the intergenerational trauma and persistent search for meaning in the wake of industrial collapse. These works show that industrial work was more than an economic transaction and instead embodied dignity, skill and belonging. Its loss led to material insecurity along with identity crises and social disintegration.

³ On orientation to self-activation policies in the labour market, see Svetlik and Batić 2001.

Williams' concept of *structure of feeling* explains how industrial worlds shape subjectivities even after their material base has started to erode. Williams emphasised lived meanings and values that are felt and endure beyond the political economic changes, forming a generational and collective experience (Williams 1997, 249–56). This concept is employed in deindustrialisation studies (Byrne 2002; Bonfiglioli 2019; Strangleman 2012) and provides a lens for understanding how workers interpret ongoing changes through attachments to industrial social and moral worlds.

Such a framework helps to interpret three prominent themes emerging from the interviews in this study: a strong sense of belonging, deep investment in labour, and feelings of betrayal and dispossession. Often dismissed as nostalgia in public discourse, these feelings represent a shared experience with roots in the self-management and ongoing post-socialist transformations. The following chapters show how such entanglements of past and present disrupt dominant transition narratives that depict the shift from socialism to capitalism as linear and unidirectional. Yet, the public discourse has largely ignored these lived experiences. Since the 1990s, the media's coverage has focused on the financial aspect, business, profits, and managerial expertise at the expense of workers' voices. With such a focus, strikes became cast more as a problem than political acts and striking workers not as agents but as burdens of transition or its passive victims. Even when they were acknowledged, their criticisms were reduced to nostalgic grievances, sentimental expressions of the 'good old days' of the bygone socialist era, and not as grounded critiques of structural injustice. Within this framing, workers' struggles became seen as collateral damage in the narrative of progress that viewed factory closures as inevitable steps toward modernisation.

Portrayals like that described above were not neutral. They were ideological, shaping public perceptions, and workers' self-image. Structural inequalities were recoded as classed narratives which portrayed industrial labour as backward and inflexible (Munt 2000; Skeggs 1997). In postsocialist Slovenia, this devaluation was intensified by associating industrial work with socialism, excluding workers from the new imaginaries of progress. These processes had a profound impact on already damaged communities and further eroded workers' social- and self-respect.

Seen as remnants of a past era, industrial workers were subjected to retraining programmes intended to 'modernise' them. The author witnessed one such course in the production of the Litija Spinning factory in 2004 while conducting the fieldwork. Another programme was described to the author following the collapse of Mura in 2009 (Vodopivec 2021, 161–63). Only a few useful skills were offered by these programmes. Their primary goal was to reshape workers' subjectivities, often in infantilising and humiliating ways. They resembled dispossession masked as rehabilitation rather than empowerment, illustrating how neoliberal policies had sidelined workers' voices and were actively seeking to remake their identities.

The author's reading of media and public discourse treats nostalgic depictions of workers' emotions as political interventions. Following Dominic Boyer's critique (2010), in this article postsocialist nostalgia is approached as a political symptom. While Boyer focuses on East–West dynamics showing how Western discourses framed Eastern European nostalgia as sentimental, regressive, and merely a coping mechanism, similar logics structure Slovenian public discourse. Here, nostalgia attributed to working-class subjects acts as a form of economic and cultural violence. It silences critique by recasting resistance to deindustrialisation and systemic injustice as backwardness or emotional overreaction. In this way, nostalgia becomes a political tool that legitimises entrepreneurial transformation and reinforces the marginalisation of industrial workers.

Anthropology plays a key role in countering such narratives by focusing on experiences. As the section below shows, deindustrialisation is not a closed chapter. It is an ongoing, contested and emotionally charged process.

ETHNOGRAPHY OF RESTRUCTURING

Silva Mlinarič worked for 25 years as a seamstress in Mura's menswear department in Ljutomer. When we met in 2011, 2 years after the company went into bankruptcy, she described how feelings of being exhausted had long preceded the closure, chaotic reorganisations, increasing quotas, unbearable heat, noise, and tension. "We were like chickens under light bulbs"⁴, she said, recalling the 42-degree heat in production department. As pressure mounted, relations soured, and conflicts spread beyond the shop floor into the community in which most workers were living.

Silva refused to stay silent. She confronted supervisors over the unsafe conditions, but was ignored. As her fatigue grew, she sought medical help, where she met other Mura workers struggling with similar problems. They, too, were grappling with the outcomes of changes typically described as work intensification. A psychologist from Ormož Hospital told me in an interview in 2011 that she had been treating Mura workers individually since the 1990s. These were, however, not isolated crises, but embodied expressions of a structural breakdown; devaluation, disrespect, and fear of the future. Yet, they were treated by politics, managers, the broader public, society at large, within the neoliberal discourse as personal failures, not as collective consequences of systemic transformation.

Silva developed carpal tunnel syndrome – a seamstress injury shaped by repetitive labour and the intensified, reorganised work during the factory's final years. Her pain was dismissed by factory management and the occupational doctor⁵. She paid a private specialist who immediately performed surgery. During medical leave, she was surveilled by detectives hired by the factory. Upon

⁴ Interview, Murska Sobota, June 2011. All interviewees provided informed consent. Several chose not to be anonymised, and their requests to use their real names have been respected.

⁵ Despite binding EU regulations, Slovenia lacked a legal framework for occupational and work-related diseases other than asbestosis, a legislative void that persisted until 2023 (UL RS 25, 24.2.2023).

returning to work, the conditions remained unchanged, and her injury eventually affected her entire left side, making her increasingly unemployable.

Nonetheless, the dominant discourse shaped by the self-responsibility paradigm insisted it was up to her to ‘reinvent herself’. Within neoliberal logic, the body is expected to be self-reliant, mobile, and flexible. This logic obscures the structural contradictions between labour and health. Workers like Silva were stripped of employment but also of their body and capacity to work, deindustrialised in the most literal sense (compare Storey 2017, 60–62).

After the bankruptcy, Silva, then 42, returned to school and excelled. Her confidence was renewed and she felt a sense of belonging to the new ‘knowledge-based’ society. She dreamed of studying gerontology, although age (she was considered too old for the labour market), chronic pain, and lack of resources prevented that. Becoming ‘just a housewife’ was hard to accept. For women of her generation, paid work meant independence. Its loss signalled a return to being dependent on husbands, parents, or the state, which was experienced as going backwards.

By the time Mura closed in 2009, the workers were already depleted financially, physically and emotionally. Wages had long been low, savings minimal, credit inaccessible. The closure, while having its own specificities, echoed broader patterns of factory shutdowns. Notwithstanding years of accumulated strain, the final collapse came as a traumatic shock. Workers described paralysis, fear, shame and humiliation. They felt injustice and dispossession, but public discourse urged them to forget and “move on” (Vodopivec 2021, 70).

The closure was publicly framed as a tragedy, yet the outrage focused on the symbolic loss of Mura as a national brand, not the workers. The official economic discourse saw Mura as socialist relic unfit for a modern, competitive economy (Tajnikar and Pušnik 2009, 12, 13). The rhetoric of inevitability depoliticised its closure, framing it as a rational step toward progress.

Still, for workers like Silva, it was a violent rupture. Most lost their jobs, while a ‘healthy core’ of 600 was retained, implicitly suggesting the rest were expendable. The term “healthy core” is a corporate metaphor that treats workers like an infection to be removed for the sake of the organisation’s survival (Stein 1998, 8)⁶. The restructuring fragmented the workforce; some received severance, others were rehired on precarious contracts, and many were discarded. This division fostered competition and conflict, eroded solidarity, deepened feelings of isolation and loneliness.

Even though many workers blamed Mura’s management, the state, a part owner of the company, was seen as the ultimate betrayer. While the state plays a crucial role in all my interlocutors’ narratives across Slovenia, with Mura its betrayal was far more severe. It not only failed to protect workers’ rights, but its active involvement in the bankruptcy raised suspicions of intentional

⁶ For similar observations, see Vogrinc (2009) and Močnik (2010).

negligence. Moreover, some workers were transferred to a newly established company without any capital just before the bankruptcy, without an explanation or clear criteria for their selection, which caused a financial loss. The author's interlocutor, entitled to €14,000 in severance pay, never received it. Like about 1,900 others, she filed a lawsuit, only to learn there was no legal basis for their claims. In effect, the workers had paid for their own dispossession because the state not merely failed to protect their rights but had a significant role in their exploitation (Vodopivec 2021, 213–40).

These were not just economic losses as they also amounted to deep political experiences. Still, they were individualised and stripped of collective meaning. Public discourse, and much of academia failed to take them seriously. The privatisation of suffering reflected broader patterns of depoliticisation in Slovenian postsocialism. Even when suspicions of fraud emerged, they were quickly overshadowed by the celebratory discourse of economic regeneration, one that focused on firms and not the people left behind. Prime Minister Borut Pahor praised Mura's "healthy core" as a phoenix⁷ rising from the ashes (Gerenčer 2010, 1).

Clarke's study of Moulinex (2015) shows the importance of public interpretations of factory closure for working-class communities. In France, workers and their local communities, including academics, activists and lawyers, challenged the dominant narrative of the closure. The political mobilisation led to securing compensation and providing an alternative interpretation. In contrast, such efforts in Slovenia were fragmented. Competing interpretations of factory shut-downs nonetheless remain a persistent, latent problem that continues to divide former industrial communities.

A study by the Clinical Institute for Occupational Health confirmed long-lasting physical and psychological harm (Draksler et al. 2018) caused by Mura's restructuring, warning of cumulative effects and structural dangers. In any case, these findings triggered no policy changes. The economic need for restructuring continues to justify mistreatment while social suffering is individualised and depoliticised. Workers' emotional experiences are typically dismissed as excessive sensitivity or attributed to their class, gender and age, and not recognised as expressions of structural violence.

There was little interest in exploring the deeper causes of Mura workers' experiences, leaving the structural conditions of their suffering invisible and their emotional pain misunderstood. This points to the need to study the historical context behind these experiences.

⁷ The phoenix metaphor originates from corporate language and in Slovenia was promoted by Maks Tajnikar (2000, 264–66).

SELF-MANAGEMENT AND THE MORAL ECONOMY

To fully consider the emotional and social dimensions of deindustrialisation, we must consider the historical role of factory work in shaping workers' identities and their sense of belonging. The analysis builds on ethnographic attention to how self-management was lived and understood in everyday practice. The phrase "our factory" deserves closer attention as it does not directly reflect ownership in the sense of private property regimes. It refers to a deep sense of belonging rooted in experiences of self-management, influenced by commitment, solidarity, collective effort, and shared sacrifice. As the Litija Spinning factory's former director noted⁸, this sense of belonging did not come into being by itself; it had to be developed and nurtured through meetings, bulletins, celebrations, and welfare arrangements.

Recent anthropological debates have revisited the concept of moral economy to stress how political and economic relations are always embedded in social expectations, obligations, and shared understandings of legitimacy and deservingness (Palomera and Vetta 2016; Yalcin-Heckmann 2022). Rather than treating moral economy as an ideal grounded in justice, fairness or morality, these approaches emphasise the way it emerges from historically situated economic practices, institutional contexts, and experiences. This article draws on the concept to show that the moral economy in socialist Yugoslavia was shaped by practices and ideologies of labour and self-management, becoming central to how workers understood their role in the factory and society. These frameworks were not merely ideological or abstract, but lived and negotiated in everyday practices, impacting workers' understandings of what was legitimate, deserved, and socially valuable. The factory was not just a workplace. It was a moral and social world where ideas of recognition and social value were actively negotiated in everyday life.

To grasp why the loss of work and recognition was experienced so deeply, we must look at historically rooted expectations of social contribution, legitimacy and reciprocity. Although the interlocutors rarely mentioned self-management explicitly, they spoke of "having a voice", "having a place" and "being considered", reflecting ideas promoted by the system, particularly as regards "participation" and the "criteria of labour investment" on which social property was based. These expressions reveal an experience of participation shaped by formal structures, such as workers' councils, and everyday practices of collective effort, solidarity, and mutual dependence. While sociological studies at the time (Arzenšek 1981; Rus 1985; Rus and Adam 1986) noted gaps between worker power and director control, they also showed that workers valued transparency and fairness more than decision-making. The experience of self-management was, apart from the institutional design, also influenced by the expectations that arose from lived relations of labour, effort, and long-lasting norms.

⁸ Interview, Litija, September 2003.

Participation took many forms. Factory bulletins, workers' council records, and interviews show that despite differences concerning class, regions, gender and age, workers generally used the workers' councils to raise concerns about their immediate work and living conditions. Numerous grievances in these reports reveal tensions in socialist production, at the same time as showing that workers' councils served as mechanisms for articulating and addressing workplace problems (Vodopivec 2025a).

In practice, directors relied heavily on workers, especially in labour-intensive sectors like textile, which faced material shortages. The dedication of workers in these situations, which demanded hard work and overtime, fostered a factory collective. Workers in self-management often identified more strongly with their factory, calling themselves "Muraši" (for a similar case, see Musić 2021, 81), than with class, an identity that extended beyond factory walls, deeply shaping local life and economic well-being. Factory labour was widely seen as the foundation of local development.

Factory life involved navigating various forms of discipline from assembly lines and strict hierarchies to self-management practices, alongside generational, class, and gender expectations, all while balancing family and personal aspirations. Making up the majority in textile production, women were placed in dependent positions, although they could negotiate authority through institutional mechanisms. These challenges were often unwelcome, particularly when they disrupted group dynamics, mutual reliance, and the ideal of a hard-working woman. Interviews show that production work was far from alienating; it involved tacit knowledge, deep engagement, and embodied investment, creating value through the practice of work.

For many, self-management was an abstract concept, yet their interviews reveal meanings impacted by the ideology and lived realities of work. Workers understood their labour as vital for the factory as well as for wider social and economic life since factories funded welfare, housing, and social services. These issues were frequently discussed at various meetings, making industrial labour a cornerstone of daily life, preserving its value even as knowledge-based work became more prominent after the 1970s. Looking beyond formal structures reveals how self-management produced a moral economy grounded in lived norms and entitlements.

This moral economy was shaped by the increasing autonomy of factories from the 1960s onward, and articulated and negotiated through work and discussions in workers' councils. While choices over wages and investments were constrained, these ongoing discussions and everyday rituals embedded self-management in experience. These interactions influenced the sense of obligation and entitlement, providing a moral framework in which they could assess and criticise the system and its practice. Workers sometimes accepted lower wages to fund modernisation. Even though such decisions could be influenced by directors, the key was their involvement in the process. Even when discussions

entailed disagreement, frustration or protest, the very fact such debates emerged was significant. What today might seem like a loss was then experienced as an investment in the future, deepening attachment to both the factory and the community.

Already limited by taxes and administrative constraints, participatory practices even weakened during the period of austerity in the 1980s. The textile industry was systematically underfunded, underpaid (Glas 1987, 29, 30), and more heavily taxed “for the common good” (Bešter and Bregar 1977, 59). This led to persistently lower wages. While workers partly embraced their role in local development and the Yugoslav “common good”, they were also aware of the uneven distribution of the burden. Women, in particular, carried multiple burdens; undervalued at work, contributing more toward social standards, while also caring for families and households. Over time, this logic of giving without adequate return caused exhaustion and disillusionment.

Yet, at the time these investments held meaning. Value was not only material. It was also created through long-term engagement, collective work, solidarity, and sacrifice. The latter should not be seen as passive endurance but as productive, future-oriented action. Such ideas of contribution and entitlement affected how workers understood their economic role and expectations. The idea of social property, though abstract, was rooted in such an embodied meaning of factory labour. It was grounded in the right to manage based on one’s labour, meaning that those who worked had the right to decide on income distribution, internal and external investments, and wages. While the actual influence of production workers may be debated, they were included in procedures. They also claimed this right. This fostered a sense of entitlement central to the moral economy, generating expectations that workers’ investments would be recognised.

These moral claims became visible in strikes, which besides wages addressed violations of shared norms and rights (Thompson 1971), with workers protesting against “illegitimate accumulation” (Rudi Kyovsky et al. 1968, in Kavčič et al. 1991, 101), and expressed concerns about entitlements, obligations, tolerable inequalities, and dignity. The concept of moral economy helps understand the dispossession discussed in the following section as a break in expectations formed through the experience of self-management.

DISPOSSESSION AND DEINDUSTRIALISATION

Using the concept of dispossession, this article presents deindustrialisation as an ongoing process that fragments working-class solidarities and marginalises their political claims. Grounded in practices and promises of self-management, these claims did not disappear overnight, and have influenced how workers have made sense of what was taken from them.

Rooted in Marxist theory (Harvey 2003; Kasmir and Carbonella 2014), dispossession describes how capitalism accumulates wealth through expropriation from peasants and Indigenous peoples to industrial workers. Although contexts

differ, a common thread remains: dispossession is a form of structural violence that severs people from the means for their social reproduction.

In Slovenia's post-self-management context, dispossession was not only about job losses. It was also deeply political and material, with workers being stripped of their nominal roles in factories and of futures they had helped to build. To fully understand this, we must consider the moral economy of self-management, workers' understanding of how they built their factories and communities through labour and sacrifice. The dismantling of factories therefore unravelled these political and social arrangements. In the postsocialist market transition, past collective achievements became devalued within the new moral and economic order.

Dispossession, in this sense, extends beyond the immediate consequences of failed or corrupt privatisations, 'wild' privatisations, managerial exhaustion, or buyouts, the forms usually understood as robbery. It was more than the loss of jobs or assets, and instead marked a deeper social rupture, highlighting a broader political failure, the new economic order's inability to recognise or incorporate the value, worth and sacrifices of workers' labour and investments that had defined the moral economy of self-management. This was not simply an economic shift but a profound cultural and political rupture, one that disorganised and displaced the working class by eroding its political, social and symbolic recognition. Workers' investments became illegible and irrelevant. What was once a shared accomplishment and a material foundation was erased or devalued, leaving workers materially and symbolically dispossessed.

Don Kalb described dispossession in Poland as rooted in the collapse of the intellectuals–working class alliance, and the transfer of social property to transnational capital (2009). In the Slovenian case, however, such an alliance is less clear and would require careful historical investigation. What can be observed is a more fragile and complex alignment between workers and critical intellectuals that began to emerge in the late 1980s, united by their critique of the federal state, austerity measures, and bureaucracy. Notwithstanding this shared discontent, their underlying agendas diverged.

The massive strike movement after 1987 was not a call to abolish socialism or self-management but an expression of frustration with its implementation, especially inefficiencies within the Basic Organisations of Associated Labour (BOALs). These strikes mainly resisted austerity measures imposed by external creditors, which introduced wage freezes, inflation, and fiscal burdens with disproportionate effects on productive sectors (Prinčič and Borak 2006, 437–85). Austerity policies also reduced workers' participation in self-management (Podvršič 2023, 62–87). Discontent targeted federal policies, bureaucratic systems, and internal distributive arrangements, such as subsidies to unprofitable firms and underdeveloped regions.

The industrial working-class critique resonated somewhat with intellectuals and reformist politicians, yet at other points clashed. While workers framed their struggles in moral-economic terms rooted in socialist legacies, arguing for

efficiency criteria based on industrial labour, critical intellectuals, who formed a diverse alternative scene at the end of the 1980s⁹, could neither understand nor support the socialist iconography emerging in these protests (Vodopivec 2025 b), promoting alternative visions that challenged labour ideology itself. The ideology of the new social movements was “sharply oriented against the labor movement, and this negation became a constitutive part of their self-definition, while simultaneously remaining blind to the legacies of older movements” (Kuzmanić 1994, 161).

Many industrial workers supported the formation of an independent Slovenian state, hoping it would offer solutions to the deepening economic and political crisis. Yet workers’ hopes were soon dashed because they were increasingly relegated as the new social and economic order took shape. Although transitions differed across postsocialist states, the symbolic and material displacement of the working class was similarly profound. Liberal regimes reshaped class relations, and dispossession unfolded via this reconfiguration and the transfer of social property into individual ownership. The marginalisation entailed was accompanied by significant shifts in social values and political discourse.

A 1988 opinion poll revealed growing hostility toward inefficient firms, while, for the first time, efficiency overtook equality as the dominant value. Most Slovenians supported “a new model of democratic, market-oriented socialism grounded in political and ownership pluralism” (Frančeskin 1988, 8). These ideological shifts were, however, not spontaneous reactions. One study by the Criminology Institute observed how they were actively promoted by managers, politicians and intellectuals, who framed labour discipline as essential for the market transition (Vodopivec 1991, 211). Yugoslav sociologists were among those reinforcing these values, legitimising the restructuring efforts and strengthening the emerging post-industrial paradigm (Cvek 2021). This coalition impacted the ideological and policy framework of the postsocialist transition, driving labour reforms that ultimately marginalised industrial workers.

In this context, it is argued here that the then defenders of labour were not critical intellectuals or new political parties, but the reformed Confederation of Trade Unions of Slovenia (ZSSS), established in April 1990. Until then operating under the umbrella of the Alliance of the Socialist People, ZSSS had already started to act as a workers’ organisation even before being formally restructured (see also Mesmann 2012). The confederation’s transformation was driven by political pressure from both the emerging intelligentsia and workers themselves, responding to the rapidly shifting political and economic landscape.

We should move beyond a binary view of trade unions as having been either Party-affiliated or independent. The emergence of labour representatives, notably the reformed independent unions, was a complex political process involving

⁹ Martin Pogačar (2025) challenges the singular understanding of ‘alternative’ as a term and movement (see also Mastnak 2023).

multiple hierarchies and coalitions on different levels, including workers, professionals, managers, intellectuals, and members of former socialist institutions such as the League of Socialist Youth, who promoted new unions (independent of the Party and opposed to formal trade union structures), as well as representatives from the older union apparatus.

Even prior to the reforms, the editor of *Delavska enotnost*, a journal published by ZSSS, criticised the draft Enterprise Act for “dispossessing workers by depriving them of their formal power... while intellectuals were busy debating tactics for their own struggle for power” (Kavčič 1988a). The editor was also critical of the haste with which the law was being adopted, warning that it was pushed through so quickly that “workers wouldn’t even have time to read it, let alone respond” (Kavčič 1988b, 4).

Implementation of the Act triggered widespread layoffs, bankruptcies, and the erosion of production workers’ rights and status (Žnidaršič Kranjc 1994). In this rapidly changing context, it was the trade union (and that was even before its formal transformation) which advocated minimum wage legislation, standardised layoff criteria (e.g., for technological redundancies), and minimum labour standards. After the legalisation of strikes in 1988, union representatives increasingly stood with workers during bankruptcies, offering legal aid, supporting collective and later individual lawsuits, fighting for unpaid wages and contributions or, in the case of the 1990 Lilet strike in Maribor, joining the occupation of the factory. These efforts laid the groundwork for collective agreements and union demands in the 1990s. Wage disparities and the loss of labour protections added to workplace and regional inequalities, intensifying dispossession despite the emerging alliances between the state, capital, and trade unions in the 1990s.

This process unfolded within the broader context of parliamentary democratisation and the formation of tripartite bargaining structures in the 1990s (Stanojević 1994, 2000), a discourse that often masked the ongoing economic exclusion and social marginalisation. On one hand, trade unions were helping workers in concrete situations and mobilising labour power. On the other hand, they negotiated labour power while accepting the dominant post-industrial and postsocialist transition narrative. The erosion of working-class power occurred through negotiation, with trade unions at the centre of these compromises especially in relation to the rising national bourgeoisie (Bembič 2018).

CONCLUSION

Understanding of the postsocialist transition cannot rely solely on macroeconomic indicators and capital calculations. It must consider people’s experiences, class reconfigurations, inequalities, and the diverse contexts of workers, places and regions. Only by including these perspectives can we grasp the complexity of social transformation.

This article argues that postsocialist transformation should be framed via the lens of dispossession, not simply as the loss of employment or assets, but as the erosion of social life, a moral economy rooted in collective labour, long-term investment, and socialist visions of futurity. Moral economy should be understood as a political economy grounded in specific norms, values, and social arrangements. In this context, deindustrialisation is not a natural endpoint of economic activity but a form of structural violence characterised by political invisibility, social devaluation, material and bodily dispossession. Ethnographic narratives, such as Silva's story, reveal how dispossession included bodily and symbolic loss, and reflected a deeper social rupture.

The presented research shows that dispossession in Slovenia unfolded in multiple, intertwined forms. It exposes a broader political failure, the new economic order's inability to recognise or incorporate the value and worth of (industrial) labour. The concept of moral economy helps with understanding dispossession that goes beyond the material, as a rupture in historically grounded expectations of entitlement, recognition and reciprocity, expectations influenced by the experience of self-management.

The loss was uneven given that the transition evolved in different ways. Factories restructured even within the trade union negotiations, and while some sectors continued to negotiate, labour-intensive sectors like the textile industry were gradually dismantled. This was driven by a prevailing discourse of globalisation, presented as inevitable, neutral and unquestionable. Such understanding impacted public narratives and structured how the economic restructuring, and the dispossession it entailed, was carried out.

These complexities call for ethnographic and anthropological approaches attentive to the moral, embodied and situated dimensions of dispossession and sensitive to diverse cultural understandings and local explanations. In line with anthropology's commitments to reflexivity and situated knowledge, this research critically reflects on the discursive fields and knowledge regimes that affect both the object of study and the researcher's position. It challenges the political, institutional and disciplinary frameworks underpinning key concepts like "transition", understood not as a neutral but as a historically and politically situated category shaped by normative and epistemological assumptions. Such a critical perspective is essential for revealing the experiences of dispossession and the moral economy of industrial labour, offering a nuanced understanding of the cultural and political ruptures of the postsocialist transformation.

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OD SAMOUPRAVLJANJA DO POSTSOCIALIZMA: UTIŠANE IZKUŠNJE RAZLASTITVE INDUSTRIJSKIH DELAVCEV V SLOVENIJI

Povzetek. Članek raziskuje postsocialistične politične in ekonomske preobrazbe v Sloveniji skozi izkušnje tekstilnih delavk in delavcev. Na podlagi dolgotrnega etnografskega raziskovanja razkriva razkorak med prevladujočimi makroekonomskimi naracijami in vsakdanjimi izkušnjami razlašanja. Poudarja, da je bilo samoupravljanje oblika politične ekonomije, utemeljene na kolektivnem delu, dolgoročnem odrekanju in skupnih vlaganjih v družbeno lastnino. Postsocialistična prestrukturiranja so razgradile institucije in materialni svet, ki so ga ljudje gradili skupaj. Deindustrializacijo gre zato obravnavati kot strukturno nasilje, ki je izbrisalo razredni konflikt iz javnega diskurza ter prikrilo zgodovinske, družbene in afektivne razsežnosti razlastitve.

Ključni pojmi: industrijsko delavstvo, postsocializem, razlastitev, moralna ekonomija.

Jaša VESELINOVIČ*

GEOECONOMIC POSITIONING OF THE SEMI-PERIPHERY: SLOVENIA, THE CAR INDUSTRY, AND THE POLITICS OF CHINA ENGAGEMENT**

Abstract. The article explains Slovenia's geoeconomic positioning amid the intensifying US–China rivalry. Drawing on a critical political economy framework and the literature on growth models, the concept of geoeconomic exposure is introduced to illustrate how Slovenia's export-led economy – particularly its reliance on the German automotive industry – influences foreign policy. The article reconstructs the emergent (and contradictory) push for government-supported 'internationalisation' of the Slovenian economy towards China spearheaded by the auto industry in search of diversification away from flailing German car giants and towards (Chinese) electric vehicle supply chains, thus shedding light on the elite's strategising in the EU periphery.

Keywords: Geoeconomics; Slovenian foreign policy; Semi-periphery; Automotive industry; European Union; China; Growth models.

INTRODUCTION¹

While addressing the Slovenian Parliament in April 2025, Prime Minister Robert Golob, still reeling from President Trump's "Liberation Day" tariff announcements, declared that "Europe is alone"; "behind us are the times when the EU could rely on its economic and security partners and allies around the world" (Državni zbor, 2025). Even though recent developments underline the question of Slovenia's and the EU's positioning and competitiveness in the

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shifting and unpredictable global economy, this issue is neither new nor Trump 2.0-induced. In fact, it has for years been at the centre of the EU's geoeconomic turn and predominately been struggled over with respect to the EU's future relationship and dependence on China (Biba 2024).

A recent episode offers a glimpse into the Slovenian elite's reasoning about the new predicament. In October 2024, Slovenia was, together with Germany, one of only five EU member states to vote (ultimately unsuccessfully) in the European Council against imposing additional tariffs on electric vehicles made in China. A few days later on the sidelines of a meeting between representatives of the Slovenian and Chinese car industries, Slovenian economy minister Matjaž Han explained the vote was based on "consultations with the industry and our largest partners" (STA, 2024). His ministry later confirmed there had been "thorough consultations with the car industry", adding "it is not insignificant that the German position was identical, since this country remains [Slovenia's] most important partner in the automotive industry" (Lončar 2024).

The reasoning provided by Han and his ministry is both banal in content but also surprisingly honest by plainly describing the elite's thinking and decision-making in a semi-peripheral export-dependent country as the global economy's structure is shifting. More generally, this episode highlights the new sort of foreign (economic) policy issues brought to the surface by growing geopolitical tensions between the USA and China, and raises the question of the positioning of a small member state in the EU's "geoeconomic turn". How, then, are we to understand and analyse the geoeconomic positioning of a country in the integrated semi-periphery in these processes?

Slovenia is a particularly interesting case to approach this question. Its economy is highly dependent on (diversified) exports and tightly integrated – on a technologically relatively high level – into the French and especially German-led car industry. Yet, unlike some other post-Yugoslav and CEE countries, Slovenia has not become a staging ground for Chinese large-scale (infrastructure) investments, which have been the subject of China-critical securitisation across Europe (Bojinović Fenko and Kočan 2022, 205; Song 2018; Babić and Dixon 2022). Moreover, one of Slovenia's main foreign policy goals has traditionally been to align with the EU's foreign policy. Still, the latter is now increasingly contested and contradictory, notably with respect to China, giving Slovenia and other smaller member states cause to become disoriented yet arguably also greater room for manoeuvre.

As I will show, the existing literature on Slovenia's political economy and foreign policy is of limited use in answering the above question. Instead, the article draws on some of the recent works analysing Slovenia from a critical political economy perspective and expands on the Growth Model perspective by accounting for geoeconomic dependencies. By so doing, a framework is proposed whereby foreign economic policymaking and strategising are understood as shaped and conditioned by the structure of the domestic political economy,

the exposure of this growth model to the geoeconomic and market power of China and the USA, and the embeddedness of its most dynamic export sectors in broader global and European value chains.

Analysing primary and secondary sources along with relying on insights gained from five semi-structured interviews, it is argued that under the new government (in place since June 2022) a tentative political turn has occurred towards viewing China as, chiefly, an (inescapable) economic opportunity, thereby going somewhat against the EU derisking-focused mainstream. The described still hotly contested development that is rarely (never officially) articulated as a national development project has been driven by the centrality of the Slovenian car industry to its export-driven growth model and its considerable dependence on ailing German car brands lagging behind in the transition to electric vehicles (EVs). In this context, diversifying the Slovenian economy, and, notably, the car industry away from the crisis-ridden German value chain and towards China, has become an official priority, driving state support in the form, among others, of economic diplomacy, state aid, and a China-friendly vote on EV tariffs in the EU. Although the primary goal of this article then is to explain the emerging Slovenian geoeconomic positioning (namely, the general policy direction, not individual policy decisions), the analytical contribution is broader since a critical political economy-informed framework applicable to different states and time periods is proposed.

The remainder of the article is structured as follows. We first survey the literature on the shifting global order and the concomitant ‘geoeconomic turn’ pursued by the EU in recent years to identify the challenges faced by a peripheral export-led economy like Slovenia. The literature on Slovenian foreign policy and political economy is then briefly reviewed to provide the basis for the next section in which a new analytical framework is proposed and applied to Slovenia. In what becomes a sort of plausibility probe for the model, the model is drawn on to arrive at an explanation of Slovenia’s seemingly contradictory positioning with respect to China in the emerging multipolar order.

THE CHALLENGE OF GEOECONOMICS AND THE GLOBAL GEOPOLITICAL REALIGNMENT

In the last decade, the global economy has undergone a fundamental shift towards multipolarity, propelled by worsening US–China multi-dimensional rivalry (geopolitical, tech war, development, finance). With the project of neoliberal globalisation now in decay, commitment to free trade has given way to uneven, bloc-like reglobalisation through technonationalist economic statecraft internationally and more interventionist and market-directing role of the state domestically (van Apeldoorn and de Graaff 2022; Alami and Dixon 2024; Schindler and Rolf 2024). In other words, geoeconomics, here defined as the fact that “beyond military, state-centred forms of ‘hard’ power contentions, today’s global landscape is being governed by more economic, network-centred, and complex forms of confrontation, competition, and cooperation” (Babić et al.

2022, 2; Schindler et al. 2023), has become the increasingly dominant mode of global politics.

The EU has responded to these developments (and in turn, reinforcing them) through what came to be known as a (fiercely contested) “geoeconomic turn” during the first European Commission presidency of Ursula von der Leyen (Bauerle Danzman and Meunier 2024; Couvreur and Veselinovič 2026). Beyond developing new policies (Matthijs and Meunier 2023; Lavery 2024; Veselinovič 2024), the EU’s geoeconomic turn in the context of broader global realignments forcefully posed the question of (geo)political strategy and positioning. In the literature, these have to some extent been tackled with respect to member states’ attitude to the more sovereigntist versions of “strategic autonomy” (Bora 2023; Aggestam and Hyde–Price 2019) or their commitment to (not) derisking from China (Bora and Schramm 2023; Germann 2023). However, the focus has been on the large member states, with smaller states being overlooked. An important exception is pioneering work on Hungary’s attracting of Chinese EV and batteries investment as an example of strategic “polyalignment” (Gagyí and Gerőcs 2025).

The geoeconomic turn then has (re)opened the question of foreign (economic) positioning for small peripheral member states both globally and within the EU. The analytical challenge is thus to account for the combination of the mutual processual co-constitution of the domestic and global (shifting) political economy and within it theorise the dynamics of geoeconomic policymaking. With regard to Slovenia specifically, the literature struggles to deliver on this task.

UNDERSTANDING SLOVENIAN FOREIGN POLICY AND POLITICAL ECONOMY: FROM EUROPEANISATION TO NEOCORPORATIST EXCEPTIONALISM

Inasmuch as the challenge is to coherently account for processes, which tend to be analysed in separate academic disciplines – International Relations and (Comparative) Political Economy, the existing research dealing with Slovenia provides important (albeit arguably incomplete) insights. The literature on Slovenian foreign policy largely deals with questions of identity(-formation) of a small state in the process of post-socialist Europeanisation and (dis-)engagement with the “Western Balkans” (Šabič and Brglez 2002; Kajnc 2012; Lovec et al. 2021; Bojinovič Fenko et al. 2023; Bojinovič Fenko and Svetličič 2022; Bojinovič Fenko and Požgan 2014). Slovenia’s foreign policy on China has only received scattered attention, mainly in the form of policy-oriented pieces² (e.g., Pejič 2023; Urhová 2024) and a recent monograph of disputable scholarly value (Svetličič 2020).

Another branch of research on Slovenia’s foreign policy concerns its commercial diplomacy. Again taking Slovenia’s ‘smallness’ as a defining feature of its

² The largest and most consistent source of topical commentary on relations between China and Slovenia, as well as current developments in Slovenian politics relevant from a Chinese perspective, is the Budapest-based think-tank China-CEE Institute, founded in 2017 by the Chinese Academy of Social Sciences to accompany the 16+1 initiative.

(im)possibilities in international relations and trade (Udovič and Svetličič 2007), authors here have (comparatively) studied the development of the institutional ecosystem of Slovenian commercial diplomacy and its activities (Arbeiter et al. 2019; Smole and Udovič 2023; Udovič 2011). Despite contributing important knowledge about the workings and dysfunctions of the machinery of commercial diplomacy, this literature remains theoretically shallow in its voluntaristic conception of diplomacy and inability to account for multidimensional hierarchies in global economy that would extend beyond acknowledging Slovenia's smallness and the fact that "the game" is mostly controlled by bigger players" (Arbeiter et al. 2019, 455).

In (Comparative) Political Economy, Slovenia has held a special place. In the Varieties of Capitalism tradition that has dominated the field, Slovenia was an exceptional case as the sole 'post-communist' country with a functioning neocorporatist system, undergirded by export-led economic growth, relatively weak and unstable left-liberal governments, and a strong union movement (Feldmann 2006; Bohle and Greskovits 2012). Unlike other countries in Central and Eastern Europe (CEE), Slovenia pursued a gradualist capitalist transformation with a "relatively low level of foreign direct investment, a slow pace of privatization, and the adoption of seemingly rigid labor relations and a generous welfare regime" (Crowley and Stanojević 2011, 269). Still, this neocorporatist settlement already started to fray in the 1990s (Stanojević et al. 2022). Any semblance of strong neocorporatism was then dismantled via E(M)U accession-induced liberalisation and pressures for internal devaluation combined with weakening unions, and the reverberations of the eurozone crisis, which sapped economic growth as the crucial precondition for the 'win-win' promise of neocorporatism (Feldmann 2017; Stanojević 2011; Bembič 2017). Most of the literature on Slovenian political economy remains in the long shadow of this exceptionalist transition story. It either struggles with dynamically incorporating 'the international' beyond issues of foreign direct investment and international financial institutions imposing the Washington Consensus or presenting a deterministic 'externalist' account whereby the growth model of Germany and the EU's (corresponding) institutional architecture lock peripheral countries into subordinate positions, extinguishing any sense of political agency (see Dooley 2019; 2023; Vukov 2023).

Partly in response to these shortcomings and to escape the analytical strait-jacket of 'Slovenian exceptionalism', a new wave of critical scholarship on Slovenia's political economy has recently emerged. Slovenian independence with its restoration of capitalism and incorporation into the US-led 'liberal world order' has been analysed through the lens of worlds-systems theory (González-Villa 2017; Močnik 2017). Arguing against overly focusing on the exceptional aspects of Slovenia's economic trajectory, in her pioneering work Podvršič contextualises Slovenia within global trends of neoliberalisation and examines the changing form of the (increasingly) dependent development and international

integration of the Slovenian economy (Podvršič 2023b; Podvršič and Schmidt 2018; Podvršič 2023a). Podvršič's account was recently complemented by Hočevar's comparative analysis of Slovenia's export-led growth model (Hočevar 2024; 2021).

While excellent contributions, most of the critical political economy works discussed above either provide an overly structuralist account or hardly touch on the questions of foreign economic policy and geopolitical positioning apart from the issue of integration into the E(M)U and the extended German industrial complex (see Pavlínek 2020). To the extent they are primarily concerned with explaining the restoration and socio-economic and institutional development of capitalism in Slovenia, the decision to set aside the "geopolitical dimension" (Podvršič 2023b, 220) may be justified. Nonetheless, it also means they have little to say about explaining Slovenia's foreign economic policy. The approach developed in the next section is hence not a refutation of all existing literature, but an attempt to selectively build on and draw from it to develop analytical tools to help understand the positioning of Slovenia (and other countries) amid realignments in the imperialist hierarchy of global capitalism.

EXPLAINING FOREIGN (ECONOMIC) POLICY IN A SHIFTING WORLD ORDER: GROWTH MODELS, GEOECONOMIC EXPOSURE, AND STRATEGISING

It is argued in this article that the starting point for explaining foreign economic policy amid geopolitical realignments is the structure of the national economy, coupled with the overall economy and particular sectors' (indirect) exposure to Chinese and US economic power. However, the structure of economies, their different levels of embeddedness in global value chains, and their varied exposure to the dynamics of US–China competition do not directly translate into policies in a deterministic or mechanistic manner (Ban and Adasclaiti 2022, 194). The state and state officials are not fully autonomous and are instead deeply embedded in complex and conflict-laden class relations, which they must try to stabilise (Clarke 1977; Jessop 2016). The 'structural constraints' of a given economy's structure and international exposures then condition the formation of coalitions of actors pursuing or contesting different strategies and make those more or less difficult. It is precisely through the processes of strategising, policymaking, and concomitant coalition-building that the divergence of interests, and potential asymmetric compromises between social forces crystallise and create the grounds for potentially articulating a new common (yet always partial) strategy of capitalist growth (see Brand et al. 2022; Schneider 2023). The agency of actors is thus not only conditioned and shaped by them being positioned on the periphery in the more abstract sense, but also through the concrete exposure of specific economic sectors, especially those which drive the economy's growth.

The starting point for understanding the economy's structure and the functional requirements of its continuous growth is the notion of a particular

national economy's "growth model". This refers to the growth contributions of the main demand aggregates (private consumption, public consumption, investment, net exports), which sum up to the growth rate of gross domestic product (Baccaro and Pontusson 2016; Akcay and Jungmann 2023). This approach commonly distinguishes three (internally differentiated) growth models: export-led, consumption-led, and balanced. It moves into centre stage issues of demand generation, instability, economic policies, and the politics underlying them. It also centres the international dimension to the extent that the (im)possibility of different growth models is already determined by the economy's position in the global currency hierarchy and access to credit. Nevertheless, the notion of 'international' employed by the growth model perspective is too narrow for our purposes.

It is not just the institutional diversity and differing levels of embeddedness in the global macroeconomic hierarchy that constrain/enable growth models and shape the formation of actors' preferences. Different sectoral composition of growth models and their incorporation into world markets and global value chains are also important determinants of actors' strategising and preference formation. Beyond the 'economic' dimensions, more straightforwardly geo-political considerations are also at play, such as security alliance memberships. The emphasis on actors' strategising with reference to sectoral composition and exposure is important here because discussions on the foreign economic policies of Slovenia are not guided simply by its export-oriented character generally, but by the challenges and opportunities of individual leading sectors within that export growth motor. State elites accordingly must strategise with reference to the geoeconomic exposure of the growth model as a whole, yet it also means that a firm's or sector's pursuit of their own commercial interest is partly shaped by the broader national structure of the economy they form part of (Germann et al. 2024, 4; Koddenbrock and Mertens 2022). Exports made by peripheral economies in CEE are typically an input into a value chain led by Germany (or another core country), which adds a further dimension where peripheral capitalists (and policymakers) must contend with the faith of the wider sector over which they have little political or economic power.

The described approach then builds on existing scholarship on the dependent development of CEE economies that stresses the subordinate integration into (mostly German-led) value chains and the constrained policy space allowed for by the European integration (however, see Vukov 2023, 844). Still, it expands on it by adding the dimension of geoeconomic exposure as an important determinant of actors' strategising and coalition-building. It therefore goes beyond abstract claims about peripheral status and dependence to provide mid-level conceptualisations allowing for studying the politics of peripheral policymakers and class (fractions) actors navigating their uneven and shifting integration into the global economy (see Dooley 2023, 5; Schwartz and Blyth 2022; Nölke 2023). In the rest of this section, we operationalise this framework and apply it to Slovenia while

discussing the structure and geoeconomic exposure of its national economy with respect to China and the USA, the two main global rivals.

Slovenia's growth model is strongly export-led. Strong reliance on exports has been the case since independence, with an important difference from the rest of CEE being that Slovenia's exports were not reliant on foreign FDI. Exports also played a central role in propping up the Slovenian economy afloat in the aftermath of the eurozone crisis, especially once the German economy had recovered from the initial shock. According to Baccaro and Hadziabdić's import-adjusted calculations, between 2009 and 2018 exports contributed more than 97% to the (overall modest) GDP growth of 1.8% during this period (Baccaro and Hadziabdić 2024; Hočevár 2024, 77–90). As a percentage of GDP, exports since 2012 have consistently amounted to between 80% and 85% of GDP (with an exceptional slump in pandemic 2020 and a rebound in post-pandemic 2022), and 81.5% in 2024, while exhibiting a high degree of complexity (12th globally and 5th in the EU) and a comparatively high proportion of high-technology exports (UMAR 2024).

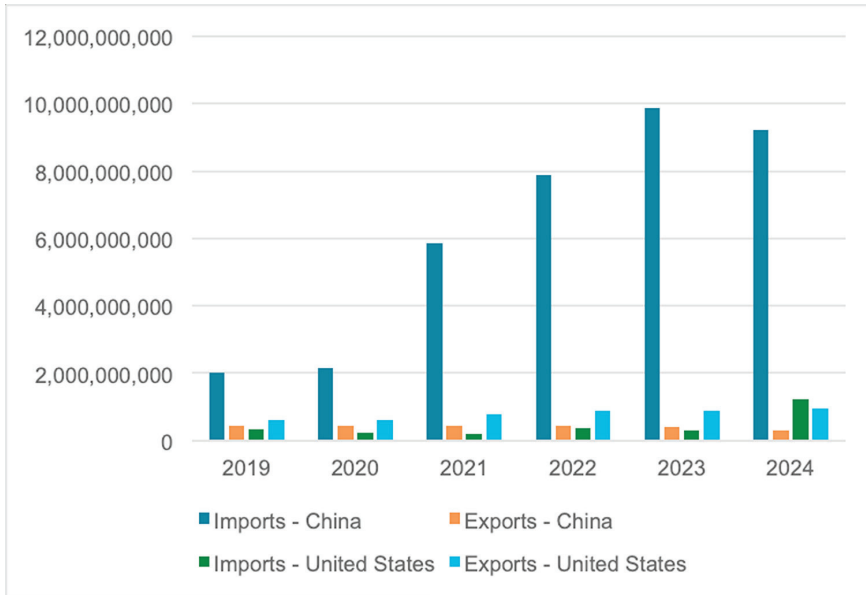
Sector-wise, the most important exports are represented by chemical products, machinery, and vehicles. For the latter two sectors, Germany is easily the largest destination market, alone accounting for almost one-quarter of exports in both sectors (OEC 2025). In chemical products, however, Switzerland is in the lead and since 2022 has also become Slovenia's largest trading partner, displacing Germany. The Swiss pole position is exclusively due to the pharmaceutical industry (97% of Slovenian exports to Switzerland), and more specifically pharma logistics; in 2018, Swiss pharmaceutical giant Novartis (also the owner of Slovenian pharma company Lek) opened its biggest logistics centre in Europe close to Brnik Airport. About half of all pharmaceuticals exports are said to be "made through logistics"; a reflection of intra-multinationals' trade and tax optimisation strategies (Lipnik 2023; see Legge et al. 2023).

Swiss investments in the Slovenian pharmaceutical industry are also behind significant portions of Slovenian trade with China (see Figure 1). In 2023, for example, China became the third-largest importing market for Slovenia, although mainly on account of organic chemical products, which also explain the sudden tripling of imports from China in 2021. Meanwhile, imports of other non-pharma-related products have been stagnating or falling (Lipnik 2023).

In terms of direct exports, the Chinese market is negligible. However, a handful of Slovenian manufacturers have established part of their production in China, the most prominent among them being Cablex, Cosylab, Dewesoft, Domel, Hidria, Krka, Unior, and Le-Tehnika. In trade with the USA, in contrast, the Slovenian economy exhibits a trade surplus, with pharmaceuticals accounting for the bulk of both exports and imports. In terms of the US market as a share of all export markets for individual industries and including indirect exposure, the pharmaceutical industry is the most exposed, with the USA accounting for over 20% of all exports in the industry (Banka Slovenije 2025,

22–27), followed in exposure by the steel and aluminium industry. In particular, Slovenska industrija jekla (SIJ) is threatened by tariffs under Trump since the US market accounts for 10% of its sales (Lončar 2025).

Figure 1: SLOVENIA'S IMPORTS FROM AND EXPORTS TO CHINA AND THE USA
IN €



Source: Own compilation based on Eurostat (2025).

While Switzerland has statistically become the largest trade partner, politically and developmentally the most significant economic partner of Slovenia remains Germany. Here, Slovenia is very much part of the broader CEE trajectory, with the region having become a pillar of the German export complex both as a backyard (technologically quite advanced) workshop that slowly overtook Southern Europe in this respect, but also an important source of demand for intermediary goods of the core (Ban and Adasclaiti 2022). Slovenia is highly dependent on foreign demand, with the proportion of exported value added exceeding 30% and Germany again attracting the biggest share (5.6%) of value added (European Commission 2024, 9).

The driver of this Germany-centric subordinate integration of CEE has been the automotive industry (Popławski 2016; Pavlínek 2020). Also in Slovenia, the automotive industry and its supply chain represent some of the most economically central sectors. According to its lobby group, the automotive industry accounts for around 10% of Slovenian GDP, contributes over 25% of the country's exports and employs around 40,000 people (Albert 2024). The Slovenian branch of the automotive industry supply chain comprises more than 100 Tier 1

and Tier 2 suppliers and over 600 firms lower down the supply chain.³ They are highly integrated into German supply chains and to a smaller degree the French/Stellantis network. To the extent then that the crisis of the German car industry is due to the “second China shock”, whereby Chinese companies are no longer suppliers for top German brands but their (significantly superior) competitors in transitioning to EVs (Tordoir and Setser 2025), the Slovenian economy’s geoeconomic exposure to China is indirect, albeit significant; when including the direct and indirect exposure of the economy, Germany is in first place, followed by Italy, Austria and China, with the USA placed eighth (Humar 2025).

Overall, the structure of the Slovenian economy, its (indirect) exposure to Chinese and US geoeconomic power, and the central place held by the automotive industry create a particular predicament with respect to the EU’s geoeconomic turn. Slovenian foreign policy, historically aligned with the EU mainstream and committed to the pursuit of “values-based” foreign policy, is being pulled in different directions in the shifting geopolitical environment. On one hand, in its stated EU policy, it remains committed to EU unity in pursuing global competitiveness a-la-Draghi, not least in competition with China (Government of Republic of Slovenia 2024). Yet, on the other hand, the dependence on the ailing German car industry, which is both threatened by Chinese EV advances and reliant on accessing its markets, also conditions Slovenian elites’ strategising with respect to China, which from this perspective appears more of an opportunity than a threat. As is shown below, the emerging but still half-hearted direction is to pursue greater economic cooperation with China to diversify from the ailing German locomotive.

The Drivers and Promises of Slovenian Diversification Towards China

In this final section, the above breakdown of the structure and geoeconomic exposure of the Slovenian export-oriented economy is the explanatory starting point for examining Slovenia’s emerging positioning in the EU’s geoeconomic turn and its relationship with (derisking from) China. Relying on secondary literature, media reports, official statements, business reports, and five semi-structured interviews,⁴ the emergent (and still contradictory) push for ‘internationalisation’ of the Slovenian economy towards China is reconstructed. Such a post-pandemic move is spearheaded by the auto industry in the search for diversification away from the flailing German upstream partners and supported by the current government, albeit far from destined for success. This section first briefly recounts the history of political and economic relations between Slovenia and China. The second part analyses nascent attempts by the Slovenian car

³ The largest Slovenian suppliers in the automotive industry are Domel, Hidria, Iskra Mehanizmi, Kolektor, LTH Castings, MAHLE, SIJ Acroni, TAB, Talum, TPV Automotive, and Unior (GIZ ACS 2022).

⁴ Interviews with business representatives, diplomats, and ministry officials were conducted online in March and April 2025 and on average lasted 55 minutes.

industry to ingratiate itself with the supply chains behind the incoming wave of Chinese EV industry domination.

Brief Recent History of Slovenia–China Political and Economic Relations

While Slovenia has long had political, economic and cultural relations with China, not least following the improvement of relations between China and Yugoslavia, for a considerable time they were only sporadic (Pejič et al. 2022; Svetličič 2020, chap. 3; Stopić and Ramšak 2023). In terms of foreign policy, this began to change with Slovenia's integration into the European Union as well as NATO. The process and participation in EU-level decision-making required capacity-building for positioning on matters of global rather than just regional foreign policy. Simultaneously, the capacity (and need) to forge its own path with respect to regions and issues newly put on the map of Slovenian diplomacy was limited. Lacking its own national goals in these matters, Slovenia aligned itself with the stated goals of the EU, committed to the “principles of unity, solidarity and balance, all in pursuit of ‘European’ goals” (Kajnc 2012, 207).

Before the 2015 foreign policy strategy, Slovenia's ambitions were conceived in terms of concentric circles. The EU and NATO were placed at the centre, with China and the rest of Asia (along with Africa and Latin America) in the outermost third circle, where the only priority was economic diplomacy, with ambassadors acting as door-openers for Slovenian capital (Bojinović Fenko and Kočan 2022, 243). The 2015 strategy presents “cooperation with Asia” as “extremely important in the fields of science, development and innovation” (Vlada Republike Slovenije 2021, 21). Yet, even as an economic opportunity, China was long sidelined; while addressing the diplomatic corps in 2014, then President Borut Pahor mentioned India and Japan as the most important Asian partners, prompting the Chinese ambassador to leave the event (Svetličič 2020, 94).

China gained more attention, although negative, in the next iteration of Slovenian foreign policy strategy in 2021 under the right-wing government of Prime Minister Janez Janša. The document uses the hawkish US moniker “Asia-Pacific” (see Higgott 2024), and puts emphasis on “deepening cooperation with the democracies in this region”, thereby prioritising India as the “world's largest democracy” over its largest economy (cited in Pejič 2023, 108). During a visit from then Secretary of State Mike Pompeo as part of his anti-Huawei European tour, Janša's government also committed to strengthening cooperation on 5G with the USA. At the time of Pompeo's visit, Janša also doubled down on the centrality of the transatlantic bond to Slovenian foreign policy, and promised to work together with the USA to pursue the “strategic interest of our civilisation” in relations with Russia and China (Vlada Republike Slovenije, 2020).

Even though the Janša government fell before it managed to pass a law banning Huawei from Slovenia's 5G network, the prime minister did manage to cause an unprecedented upset in Slovenian relations with China. During an interview

on an Indian state-owned TV channel in January 2022, Janša was harshly critical of China and hinted at a potential diplomatic upgrade of relations with Taiwan, which he referred to as a “country”, in turn undermining the ‘One China’ principle. Janša’s appearance was neither coordinated with Slovenian diplomacy nor with his coalition partners, and the response was swift; Chinese business partners reportedly started cancelling orders and the Slovenian economy minister (from a coalition party) rejected the idea that Janša represented the government’s position, noting that China was one of Slovenia’s most important non-EU trade partners and that “personal opinions, even if well-intentioned, must reckon with economic realities” (STA, 2022; Gaube 2022b).

As shown below, the Janša government’s stance on 5G and Taiwan positioned Slovenia in the more hawkish camp of EU countries and provided a problematic starting point for the current attempt at strengthening the economic ties. With respect to the latter, the history is even more recent than with diplomatic relations, an exception being some projects of Slovenian firms in China during the last two decades of Yugoslavia. A handful of Slovenian firms then attempted to tap into the growing Chinese market in the 1990s, although business ties started to intensify after China entered the World Trade Organisation in 2002, not least as a reaction, and on the wings of German upstream partners entering the Chinese market (Jaklič and Svetličič 2019).

Slovenia has been part of the 16+1 since it was established in 2012. Still, apart from raising mutual awareness of business opportunities, the scheme has not “influenced much either the flows or the structure of trade, which oscillate more as a result of some major firms’ activities” (Jaklič and Svetličič 2019, 96). Despite participation in BRI, Slovenia has been reluctant to let in large Chinese infrastructural investments, which were discussed in the early 2010s both with respect to the Port of Koper, the construction of a second railway track leading to it, and the purchase and modernisation of both the Slovenian railways and the main international airport (Svetličič 2020, 108). Large Chinese infrastructure investments were last discussed in 2020 when the public procurement process for a second railway from Port of Koper was underway, yet the Chinese construction companies and consortia lost out (Hreščak 2020). Although officially part of the BRI and after having signed a memorandum of understanding with the Chinese port of Ningbo, the Port of Koper as the biggest container port in the Adriatic and closest entrance for Chinese products to Central and Eastern Europe has not seen any major Chinese infrastructure investments (Urhová 2024; see also Motosh et al. 2021). Beyond the core of the BRI, some significant investments were made in this period. A Chinese investor acquired the struggling bus manufacturer TAM and restarted production. Hisense bought Gorenje, a large regional manufacturer of domestic appliances. Meanwhile, several high-tech manufacturers, including Pipistrel, Arctur and Elaphe, established two-way investment partnerships with Chinese counterparts. Finally, the biggest Chinese FDI was the acquisition of Outfit7, a mobile games developer, in 2017 by United Luck Consortium for USD 1 billion (see KPMG 2021).

Restructuring of the Slovenian Car Industry as the Driver of its Newfound ‘Economic Pragmatism’ Towards China

The main task with respect to China the new left-liberal government, which started work in June 2022, set for itself was to restart the relations. New Foreign Minister Tanja Fajon immediately clarified that Slovenia is committed to the One China policy (Gaube 2022a). Her ministry also rewrote the Janša-era foreign policy strategy, which now states “Slovenia will work to ensure balanced, reciprocal and mutually beneficial trade and economic relations with China”, which is “both a partner and a competitor” (Ministrstvo za zunanje zadeve, 2024b, 12). While the government in general subscribed to the EU’s policy on China (Ministrstvo za zunanje zadeve, 2022), the famous triptych of China as a partner, competitor and rival from the EU’s China strategy (European Commission and HR/VP 2019) notably avoided mentioning any aspects of the rivalry (see Cerar 2025). During a visit to China, Fajon also pointedly noted that notwithstanding “differing interpretations of human rights”, the two countries must cooperate constructively (Ministrstvo za zunanje zadeve, 2024a). Similarly, on the sidelines of a European Council summit divided on how tough a stance on derisking from China to adopt (Lau 2023), Prime Minister Golob stated “China is so important, also as an economic superpower” that active dialogue is needed and “Slovenia will make every effort to strengthen this dialogue, both bilaterally and multilaterally” (Prime Minister Office, 2023).

What has been identified as a newfound sense of economic pragmatism with regard to China (Urhová 2024) has been accompanied by active economic diplomacy. In official strategies, China holds equal priority as some other markets, including the USA. Nevertheless, between April and November 2024, China hosted three separate visits by Slovenian foreign, economic and agriculture ministers, each complete with a large business entourage. The political reasoning of the foreign ministry was that the growing trade deficit (as shown, driven almost exclusively by pharmaceuticals), exposes Slovenia to disproportional dependence on China, which could be weaponised, and that boosting Slovenian exports means hedging against this perceived political liability while also diversifying from European export markets (Interview 4). In the process, Slovenian diplomacy leveraged its non-permanent seat in the UN Security Council (2024 and 2025), which attracted some extra interest on the Chinese side and enabled it to “punch a little above its weight” by, for example, securing a meeting between Minister Fajon and Chinese Vice President Han Zheng (Interview 3).

In what was Slovenia’s largest business delegation to China ever, Foreign Minister Fajon travelled with more than 70 business representatives. This and the two other business delegations were co-organised by the Slovenian-Chinese Business Council (SCBC), which was instrumental in assembling the large delegation of Slovenian exporters (Interview 4). The SCBC was created in September 2020 under the auspices of the Slovenian Chamber of Commerce (SCC) on the initiative of the management of Gorenje which, after the takeover by Hisense,

realised opportunities were lacking for institutional exchanges between Chinese and Slovenian capital (Interview 1). Its founding and remaining president is the former chairman of the board of Outfit7. Aside from the direct business opportunities, Slovenian capital interested in cooperating with China also has its own reasons for trying to lower the trade deficit, which is often used by those sceptical of further integration with China by framing it as China taking advantage of Slovenia (Interview 1).

The economic diplomacy and attempts at stronger cooperation with Chinese capital then are very much part of a broader (and longstanding) strategy of internationalisation and attracting FDI (GZS, 2025). We nonetheless argue that, at least in part, the new political pragmatism and intensified economic outreach towards China must be understood in the context of concerns about the future of the Slovenian economic model, and primarily, the car industry as its backbone. As one economic ministry official explained, since the goal is to “diversify the dependence on the European car industry, consequently a big emphasis is on China” (Interview 5). Namely, from the perspective of the Slovenian economy, internationalisation towards China can hardly be about the export of consumer goods and more concerns the automotive industry, the (related) machinery industry, and pharma. The German auto industry’s escalating crisis that coincided with the arrival of the new Slovenian government has both added to the urgency of this reorientation and opened the political space for it.

As discussed elsewhere in detail, German manufacturing’s slow recovery from the post-Ukraine energy crisis and the “second China shock” linked to the belated transition to green technologies, especially EVs, has induced widespread fears about the fate of the ‘motor’ of the European export model (Tordoir and Setser 2025; Munchau 2024; Schmitz and Matthes 2024). In the short term, the Slovenian state has tried to contain the fallout. When Renault threatened to close Slovenia’s largest car plant, the government disbursed an unknown amount of state aid to ‘convince’ Stellantis to reorganise the production and start producing an electric model in 2026 (Albert 2024). Similarly, when Volkswagen’s problems were most acute in the autumn of 2024, the Ministry of Labour responded by preparing a new law allowing firms to be publicly subsidised so as to retain employment during times of crisis (24ur 2025). Further, some effects of Germany’s problems may be delayed because Slovenian suppliers are picking up orders from failed German competitors, but noting that the underlying trend is the car industry’s total transformation towards EVs, the effect is likely temporary (Interview 4).

This short-term firefighting mode has been coupled with more ambitious yet still scattered medium-term attempts at reorienting to China that lie at the centre of our analysis. For its part, in 2021 the Automotive Cluster of Slovenia (ACS), the car industry branch of CSS, launched a wide-ranging programme (“Misija GREMO”) of industrial transformation along digital and green lines. Besides the grandiose announcements, the programme is significant since it

represents a first attempt to unite the Slovenian car industry around a common development strategy beyond the interests of individual firms. It also signifies a move away from the tradition of focusing only on the order book and leaving the strategising on the ‘big questions’ about the industry’s future to the German brand headquarters. This attempt at (re)thinking the ‘capital (fraction) interest in general’ and in 2023 boosting R&D investment was supported by the government to the tune of €200 million over 5 years (N1 2023).

The described process of the industry’s tentative transformation towards EVs, where Chinese companies are well in the lead, has been hand in hand with the political overtures towards China. We return here to the Slovenian vote against additional tariffs on Chinese battery-powered EVs. As we have seen, the Slovenian Ministry of Economy’s vote followed consultations with the car industry, which was both concerned about the potential effects of Chinese retaliation against the European car industry and hoped to become part of Chinese production chains. Only a week after the vote, Ljubljana hosted the Days of Automotive Industry Suppliers, showcasing the Slovenian industry to the representatives of four Chinese car manufacturers. At the event, the ministry attempted to present Slovenia as the new European location for NIO, a large Chinese EV manufacturer, with Han later stating that Slovenia “could serve as a gateway for Chinese companies to enter Europe” (Caixin Global 2024).

A month later, Han, again accompanied by a sizeable business delegation, including the leadership of the ACS, visited China in an effort to “spread [Slovenia’s] exports outside of the EU”. As he explained, these sorts of visits are about “building bridges” where, in cooperation with China, the goal is to “open doors for Slovenian firms” and improve their “incorporation into Chinese value chains as well as attract new investments from the most innovative Chinese companies” (MGTŠ 2024). Despite the ministry officially also pursuing the line that the tariff vote was a matter of longstanding principles – “Slovenia as an export-oriented country supports free trade and desires as few disruptions to the global markets as possible” (Interview 5) – it was clear during the delegation’s visit that the vote was seen as a strategic signal and appreciated as such (Interview 3). Chinese counterparts noted several times during the visit that Slovenia “voted in the manner of a friendly state” (Interview 1). Still, the vote’s payoff was relatively limited because the no vote was a last-minute decision by the economy minister, and was not communicated to the diplomats. While the vote then on the part of the economic ministry was conceived as pursuing the (automotive industry-equated) ‘national interest’, no attempt was made to use it more transactionally as a bargaining chip in advance. Some diplomats, therefore, conclude that this was an isolated case that does not herald a full pragmatist strategic reorientation in Slovenian foreign policy (Interviews 3; 4).

Nevertheless, from the perspective of the tentative redirection of the Slovenian car industry towards China supported by at least some sections of the state apparatus, the vote is important. For Slovenian capitalists’ ongoing efforts

to tap into Chinese EV supply chains, the vote created a double opportunity. On one side, it secured the good graces of the Chinese for the Slovenian state and suppliers. On the other side, because the Germany-led coalition opposing the tariffs ultimately failed and extra duties were imposed, many Chinese manufacturers are already relocating some production lines to the EU to avoid the additional burden placed on EVs made in China. Slovenian suppliers are hoping to ride this wave of new investments. However, in what sense would this solve the Slovenian automotive supply chain? In other words, apart from the economic diplomacy's necessarily vague references to opening doors and building bridges, what exactly is the project behind the reorientation of Slovenian car industry suppliers towards Chinese EV producers?

The sort of industry-wide strategising already started in part with Misija GREMO, although the ACS has now also partnered with a consultancy, Euro-Sino Automotive Association, led by Blaž Štefe who spent many years in China and established a joint venture there for Elaphe, which produces electromotors (GIZ ACS 2025). Among Slovenian business and state elites, Štefe is promoting a maximalist strategy for a large-scale restructuring of the Slovenian car industry. Given that it is unrealistic for a significant share of Slovenian suppliers to achieve scale and price competitiveness, enabling them to break into the highly competitive and already saturated Chinese market of EV-industry suppliers (Potočnik 2024), the idea is to offer an already localised supply chain for incoming Chinese EV industry investment (Interview 2). In any event, EVs are value-skewed towards the battery and software and in engineering terms much simpler than internal combustion cars, meaning that suppliers (especially of mechanical parts, as is the case for Slovenian ones) are competing over a smaller share of the value of the car. Simultaneously, Chinese EV suppliers, most famously BYD (see Gerbaudo 2024), have vertically integrated supply chains, which they bring to Europe or at least have politically sanctioned preferred suppliers from China. Suppliers which have thrived on German outsourcing throughout CEE are in danger of being left out to dry, if they are even relevant for an industry that has gone electric anyway.

The warning story repeatedly invoked in this respect is Hungary, which is famously the largest recipient of Chinese (EV) investment (Kratz et al. 2024). Yet, EVs- and batteries- focused investment came with a fully integrated supply chain, resulting in a low-wage and low value-added regime, absent of R&D functions. The knowledge spillovers and economic boost to the local economy, usually hoped for when it comes to FDI therefore largely failed to materialise and investments were instead driven by “further flexibilization of Hungary’s labor regime, and a downgrading of environmental and health regulations” (Gagyi and Gerőcs 2025, 10; see also Élterő et al. 2024). The strategy argued for by Štefe in his work with the ACS is to go beyond being just an increasingly value-squeezed supply chain, but to offer the Chinese a whole integrated ecosystem. In the EV context, this would mean R&D investment, subsidised and streamlined

investment conditions and above all IT companies able to work with software, and data collection and processing in line with EU laws. It would also require the integration and cooperation of leading Slovenian suppliers, transforming them from competitors in German supply chains into partners that guarantee steady and flexible supply for Chinese investors (Interview 2).

Obviously, such a project not only entails a considerable expansion (into more IT-heavy directions) of what the car industry in Slovenia encompasses. It also calls for a corporatist integration of existing suppliers in the service of attracting Chinese investments and – that is the bet – integration into their production schemes at a much higher value rank than has been the case in Hungary and other destinations of Chinese EV and battery investment in CEE. It is thus crucial to note that this ‘project’ is very much nascent; it is neither articulated as a national strategy nor does it underpin Slovenia’s consistent positioning within the EU (Interview 4), and is arguably very late for attracting Chinese investment compared to countries that have invested in building these partnerships for over a decade (Interview 3).

It is nonetheless important to take note of it because it illustrates the sort of challenges facing the backbone of the Slovenian economy and reflects some attempts at strategising on tackling them. This capitalist restructuring of a significant portion of the Slovenian economy towards China is also permeated with contradictions and conflicts that are bound to flourish if it is ever elevated from a ‘vision’ towards something approximating a national developmental project. The most obvious yet still latent one is the strong constituency of ideology- and economic interest-based transatlanticism. In the current government, this position is most prominently and vocally represented by Golob’s foreign policy adviser and diplomat, Vojko Volk, who publicly supported EV tariffs and warned against “turning towards China” (Šeruga and Mlakar 2024). The contradictory position of the current government has also been shown by its treatment of the issue of Huawei and 5G. Early on in its mandate, it reluctantly and under threat of a European Commission lawsuit passed the most Huawei-friendly legislation still possible within EU regulations, only to then change its mind in the summer of 2023 and adopt a much more ‘risk-aware’ stance that excluded Huawei from 5G procurement processes (Cirman 2024). On top of that, there is the probable return to power of the (at least rhetorically) very anti-China Janša-led government. While traditionally very open to the demands of capital, his susceptibility to the arguments about China being the solution to the woes of the Slovenian car industry remains to be tested.

CONCLUSION

In this article, we have argued that the literature on Slovenia’s foreign policy and political economy is of limited use for explaining the mutual determination of structure and agency in Slovenia’s strategic positioning with respect to the ongoing shifts in the global economy and the EU’s geoeconomic turn. Drawing

on critical political economy, we proposed a framework that focuses on examining the elite's agency in the context of the national economy's growth models and its specific overall and sectoral exposure to US and Chinese geoeconomic power. We have shown that in recent years, with the new government, Slovenia has cautiously shifted to viewing China as a key economic opportunity, diverging from the EU's derisking stance. Driven by its export-reliant car industry's dependence on struggling German automakers, Slovenia seeks to attract Chinese investment and diversify its economy through supportive policies and geoeconomic repositioning. While this project remains at the beginning and in any case is already politically contested and full of contradictions, it is important as it sheds light on the ongoing processes of industry-wide strategising that also feed into foreign (economic) policymaking.

Instead of summarising the argument, this conclusion teases out some limitations of the present article and presents some avenues for further research. In general terms, the article's goal was to present a widely applicable framework for understanding geoeconomic exposure in the context of US–China competition. It can be used for understanding the varied (geo)economic starting points of different national economies and as the basis for theorising the agency of both state actors and fractions of capital with associated (organised) labour. As such, it can provide a starting point for exploring the peculiar divergences among the extreme right-wing parties in CEE, which range from very hawkish on China (e.g., Janša) to those much more proactively courting it (e.g., Orban). At the same time, the framework can be further focused on specific industries, for instance particularly exposed tech industries, examining in greater detail the positions of strength (or not) in value chains and the specific exposure along the supply chains. By focusing on narrower cases of certain policy processes, it also gives an opportunity to further develop theorisation of coalition-formation and also account for party-political differences.

Second, and with regard to Slovenia more specifically, we have shown that there are the beginnings of a coalition of actors pushing towards diversifying the Slovenian car industry away from Germany and towards (also) Chinese capital (in China and in Europe). As described, this is a discernible yet still very nascent project with uncertain prospects. More analysis is therefore needed on both the precise constitution of the coalition of actors behind this project and their (potentially divergent) interests. Politically, China is not particularly salient in Slovenia, and the level of knowledge and engagement with topics among Slovenian (policymaking) elites is generally “shallow” (Pejič 2023). However, if the current project of diversification towards China continues – especially if the US–China geopolitical rivalry continues to escalate – the hitherto low salience of this issue is bound to grow. Considering that the USA is currently considering biotech and pharmaceuticals as the next frontline of the geoeconomic showdown with China (Biberman 2024), this might also put the Slovenian other export motor in the crosshairs of geopolitical competition. In that case, having an even

more detailed understanding of different actors' positioning and their relation to the overall economic structure will be even more (analytically) important. Finally, any sort of large-scale strategic response and capitalist restructuring presupposes a level of state capacity (and arguably a corporatist alignment of social forces) that, as Podvršič has powerfully argued, the process of neoliberalisation has profoundly undermined.

Interviews:

Interview 1: Slovenian business manager, 17 March 2025, Videocall

Interview 2: Blaž Štefe, founder of the Euro-Sino Automotive Association, 18 March 2025, Videocall

Interview 3: Slovenian diplomat, 10 April 2025, Call

Interview 4: Slovenian diplomat, 24 April 2025, Videocall

Interview 5: MGTŠ Official, 25 April 2025, Videocall

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GEOEKONOMSKO POZICIONIRANJE POLPERIFERIJE: SLOVENIJA, AVTOMOBILSKA INDUSTRIJA IN POLITIKA SODELOVANJA S KITAJSKO

Povzetek. Članek razlaga geoekonomske pozicioniranje Slovenije v kontekstu čedalje intenzivnejše tekmovalnosti med ZDA in Kitajsko. Temelječe na pristopu kritične politične ekonomije in literaturi o modelih rasti uvaja pojem geoekonomske izpostavljenosti, da ponazori, kako slovensko izvozno usmerjeno gospodarstvo – zlasti njegova odvisnost od nemške avtomobilske industrije – oblikuje slovensko zunanjo politiko. Članek rekonstruira porajajoči se (in notranje protislovni) premik v smeri vladno podprte »internacionalizacije« slovenskega gospodarstva v smeri Kitajske, ki ga vodi avtomobilska industrija v iskanju diverzifikacije stran od upehane nemške avtomobilske gigantov in v smeri (kitajskih) dobavnih verig električnih vozil, s čimer osvetljuje strategije vladajočih elit na obrobju EU.

Ključni pojmi: geoeconomija, slovenska zunanja politika, polperiferija, avtomobilska industrija, Evropska unija, Kitajska, modeli rasti.

Jathan SADOWSKI
**THE MECHANIC AND
THE LUDDITE: A RUTHLESS
CRITICISM OF TECHNOLOGY
AND CAPITALISM**

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of California Press, 2025,
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In *The Mechanic and the Luddite*, Jathan Sadowski analyses currents of technology in contemporary capitalism. Sadowski, a senior lecturer at the Faculty of Information Technology at Monash University in Melbourne, continues and extends the critical trajectory he started in his 2018 book *Too Smart: How Digital Capitalism is Extracting Data, Controlling Our Lives, and Taking Over the World*.

From disputes over “rare earth minerals”, calls for deregulation in the development and deployment of artificial intelligence to ongoing trade wars – primarily between the United States and China – Big Tech and those within it have positioned themselves as major vectors of power. The technologies they produce are often portrayed as democratising, revolutionary, labour-free, omnipresent and all-encompassing. It seems as if innovation and new apparatuses are our only possibility for moving forward. In his book, Sadowski rejects such simplifications of the system and offers a well-structured and materially based critique.

The book is structured in eight chapters, each addressing a key dimen-

sion of technology within the capitalist system. In the first two chapters, Sadowski outlines the main focus of his analysis, before clarifying the perspective from which he approaches these phenomena. The six chapters that follow explore the core mechanisms and dynamics of the contemporary techno-capitalist system, examining how innovation is defined, data sustains the system’s operation, human labour is obscured and misrepresented, and ownership structures and risk management shape its development. In the final chapter, he discusses possible futures of technology within capitalism, where he refrains from adopting grand narratives and focuses instead on the socially constructed nature of those futures and the importance of action in shaping them.

He commences his analysis by asserting that capitalism and technology are interconnected structures that both emerge from and shape human action. Sadowski states: “*Technology and capitalism work in tandem to create mutually reinforcing systems, which we must then work for within, and against. We cannot understand one without understanding how it is connected to the other. They have fused together into a dual system: technological capitalism*” (p. 2). Historically, technology has always played a crucial role in the development and intensification of capitalism, providing the tools by which capital can move and accumulate freely, exploit workers, and subsume other spheres of social life.

Sadowski asserts a materialist stance from the outset and appropri-

ately applies capitalist mechanisms and characteristics to current developments in technology, thus showing the great importance of such approaches, while at the same time keeping the language approachable for a wider audience. By employing common Marxist terminology like structures, (data) capital, and subsumption, among many others, the book establishes clear connections between foundational theory and today's reality. In this way, the author moves beyond commonsense and mystifying understandings of technology, offering a much needed and under-represented perspective within current technological research.

Sadowski moves to the ideology of technocratic progress and views it as a beacon of technological capitalism's power and influence. Central to this ideology is the assumption that other forms of progress (social, economic, political, moral) are secondary, if not irrelevant, and can only be achieved once sufficient technological advances have been made. By demonstrating the central role of ideology, the book rejects the seemingly objective, value-neutral and 'progressive' nature of information communication technologies (ICTs). As part of this ideology, innovation functions as both its moral and economic engine.

Innovation and all of its various (capitalist) understandings and definitions serve as the pillar of technological capitalism. The term "innovation" is abstract, meaning that it can be specifically defined by those with power over it. Innovation is therefore always a politicised concept since those who determine what counts as innovation

effectively shape the future. In modern capitalism, this role is played by venture capitalists who are the principal funders and promoters of new technologies, particularly in Silicon Valley. Their position grants them structural power and the ability to steer the digital economy in ways that favour their interests – typically promoting start-ups oriented to rapid profit maximisation (scalability) and capital accumulation, yet neglecting other forms of development and progress. Sadowski introduces the concept of *innovation realism*, an adaptation of Mark Fisher's idea of *capitalist realism*, to describe the tech sector's inability not only to secure funding through alternative models but also to imagine forms of technological development that fall outside the logic of venture capital. To understand technological capitalism, one must look beyond innovation to the force that sustains it: data.

Data plays a vital role in the construction of novel technologies and, via its entanglement with the capitalist system, has acquired conceptions, mechanisms and modes of operation, influenced by it. It is critical to reject the naturalising understandings surrounding data, for example terms like "data mining" that legitimise the extraction of supposedly "raw" material, while in actuality data is always manufactured and stems from human action. As such, it is better understood as a form of capital because it is essential for the production, extraction and circulation of value by digital systems and embodies the familiar imperatives of capital, notably the relentless drive to capture and accumulate as much (data)

as possible. Sadowski also observes how data companies (read: virtually all major corporations), through their capture of immense amounts of personal information and its integration into complex analytic systems, which are effectively and increasingly harnessed for surveillance and control, successfully turn subjects into objects. Technologies routinely objectify individuals, a process also visible in how human labour is misrepresented within such systems.

Sadowski rejects the notion of modern technologies as *autonomous*¹ or labour-free mechanisms. Instead, he focuses on how and where human agency is hidden or suppressed within their operations. Human labour, he argues, lies at the centre of both technology and capitalism since both depend on and originate from it, even as they seek to minimise its value and obscure its significance. The author introduces the analytical label of Potemkin AI – a reference to the Russian minister who built fake villages to impress Catherine the Great and hide the true state of affairs – to describe how ‘smart’ technologies are portrayed as being powered solely by neural networks, while much of the cognitive labour required for their operation, such as data annotation or content moderation, is outsourced, typically to well-known destinations in the Global South. Together with the black-boxing and mystifying language surrounding AI, which conceal its in-

ner workings and present it as objective, neutral and efficient, these systems embed themselves in social life, cultivating dependency and operating as a form of soft, (neo)imperial power.

Throughout the book, Sadowski demonstrates his ability to construct clever and often witty analytical tools – such as Potemkin AI, Habsburg AI, and the Tinkerbelle effect – which not only help researchers make sense of the phenomena and reveal the underlying mechanisms, but also engage the general public by using numerous real-life and broadly recognisable examples. Although the focus on everyday politics may appear to limit his analysis, the book intentionally avoids delving into the finer details of technological capitalism, preferring to encourage further research than offer clear-cut answers.

Sadowski deliberately avoids making grand theoretical projections or prescriptions for the future, instead concentrating on how such visions are constructed and sold by the actors and prophets driving technological developments. Visions of the future are always idealised: they arise from immaterial ideas rather than material conditions and often possess a performative or generative character – they become self-fulfilling prophecies when supported by sufficiently powerful actors like CEOs and venture capitalists. By manufacturing expectations surrounding technological development, via the management of hype cycles these actors exercise power over utopias and enable capital to render the future as a colonial frontier. In so doing, they effectively eliminate alternative imaginaries of what is possible, placing capitalist

¹ Here, we refer to Langdon Winner’s conception of *autonomous* technology developed in his 1977 book of the same name, which describes a condition whereby technology has somehow escaped human control and proceeds according to its own logic or momentum.

imagination/realism at the centre of futurism. At the end, Sadowski reiterates the importance of critically examining such manifestations given that they are always products of social struggle, and – quoting Karl Marx and Brian Merchant – highlights the need to understand how technologies function (*the Mechanic*) and what makes them socially useful (*the Luddite*).

The Mechanic and The Luddite provides both an introduction to and foundation for the critical (Neo-) Luddite tradition. It is a collection of his previous works where every chapter can also be understood as a stand-alone essay on a selected topic. This is what makes the book great at what it was intended to be; namely, an introductory text for both the academic and general publics, where certain mechanisms, characteristics and concepts are presented in theory and supported with relevant contexts and examples. While the claimed shortcomings of the book

arise from what it was never meant to be, Sadowski occasionally avoids going into too much detail, remaining on the surface level. However, he is the first to acknowledge this limitation, which stems from the book's very broad scope. In turn, he invites readers to explore these topics further by providing numerous references to relevant authors and researchers.

Overall, the book successfully presents technological capitalism as a structure that shapes our actions, rejects simplistic notions of techno-solutionism, and illuminates the many processes underlying its operation. It also represents an important continuation of Sadowski's work, seamlessly combining rigorous academic analysis with his engagement with the day-to-day political economy on *This Machine Kills*, a podcast he co-hosts with Edward Ongweso Jr.

Enej ZORMAN

John MACNICOL

NEOLIBERALIZACIJA STAROSTI

Prevod Tomaž Gerdina

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Knjiga, čeprav ne več povsem nova in osredotočena predvsem na Veliko Britanijo ter deloma ZDA, ponuja izjemno uporaben okvir za razumevanje procesov, ki so od devetdesetih let zaznamovali tudi Slovenijo, ko so Svetovna banka, Mednarodni denarni sklad in OECD začeli promovirati t.i. tristebni neoliberalni pokojninski model. Avtor obravnava temeljno vprašanje študij staranja: ali želimo ohraniti starost kot samostojno življenjsko fazo, zaščiten s socialnimi politikami, ali pa težiti k »družbi brez starosti«, pri čemer kronološka starost izgubi institucionalni pomen.

Knjiga združuje raziskovanje staranja, socialnih politik in ideoloških premikov neoliberalizma oziroma neokonzervativizma v ZDA in Združenem kraljestvu. Osrednja teza je, da demografski in ekonomski pritiski – staranje prebivalstva, podaljševanje življenjske dobe – ne določajo samodejno smeri reform; veliko odločilnejša je prevlada neoliberalne paradigme, ki preoblikuje pojmovanje problemov, jezika in predlaganih rešitev. V imenu učinkovitosti, individualne odgovornosti in medgeneracijske pravičnosti prihaja do premestitve odgovornosti z družbe na posameznika, kar ima daljnosežne posledice za dostop do socialnih pravic in za kakovost staranja. Avtor s široko empirično podlago pokaže, da vladne

reforme, ki se sklicujejo na »neizogibno« finančno vzdržnost, niso naravni odziv na demografijo, temveč rezultat politične izbire – prevlade neoliberalnega načina razmišljanja.

Avtorjeve ključne trditve so naslednje:

a) *Sprememba narativa* prikriva napade na socialne pravice starejših. Staranje prebivalstva je hkrati predstavljeno kot demografska grožnja in kot zgodba o uspehu, medtem ko se jezik aktivnega staranja ter boja proti diskriminaciji uporablja za utemeljevanje višje upokojitvene starosti in umika države iz pokojninskega varstva.

b) *Kritika postmodernih teorij*, ki starost predstavljajo kot fluidno identiteto, ki jo je domnevno mogoče preoblikovati prek potrošnje. Tovrstni pogled velja le za majhen privilegirani del starejših in zanemarljiva materialne razmere ter rastoče neenakosti.

c) *Neutrazizacija kritične gerontologije*, torej nadomeščanje teorije strukturne odvisnosti iz osemdesetih let – ki je poudarjala izključitev starejših s trga dela – z optimističnimi pristopi iz devetdesetih, ki so neoliberalnim politikam ponudili akademsko podporo.

č) *Pomanjkljivi empirični temelji*, saj se napadi na socialne pravice starejših pogosto opirajo na anekdote o domnevno premožnih upokojencih, kljub obsežnim dokazom o revščini, zlasti med starejšimi ženskami.

d) *Vprašanje delovnih mest*: če je brezposelnost starejših rezultat pomanjkanja povpraševanja po njihovem delu – od kod naj izvirajo nova delovna mesta, ko se upokojitvena starost dvigne na 70 let?

Neoliberalizacija starosti je tako

starost kot družbeno kategorijo potisnila nazaj v položaj marginalnosti, podoben tistemu iz 19. stoletja. Avtor proces napada na socialno državo umešti v zgodovinski in ideološki kontekst ter pregleda ključne teorije o starosti in upokojevanju, nato pa analizira konkretne politike: pokojninske reforme, dvig starostne meje, argumente o rasti pričakovane življenjske dobe in diskurze o medgeneracijskem bremenu. Pokaže, kako se retorika uporablja za legitimiranje varčevalnih ukrepov ter zmanjševanje obsega univerzalnih pokojnin. Pojmi, kot so »aktivno staranje«, »medgeneracijska pravičnost« in »osebna odgovornost«, postanejo nosilci nove moralne ekonomije, ki demografijo bere skozi tržno in fiskalno prizmo. Demografski kazalniki so dejanski, njihova politična interpretacija pa izrazito ideološka. Namesto razumevanja staranja kot civilizacijskega dosežka neoliberalni diskurz starost predstavlja kot finančni problem, ki ga morajo posamezniki reševati sami – z daljšim delom, varčevanjem in odpovedjo univerzalnim socialnim pravicam. Tudi statistične projekcije življenjske dobe so pogosto izbrane ali interpretirane tako, da krepijo vnaprej podane cilje.

V središču neoliberalne transformacije je *premestitev odgovornosti*: s kolektivne na individualno raven. Država se iz zagotavljalke solidarnostnih pokojnin preoblikuje v regulatorico zasebnih skladov in varuhinjo fiskalne discipline. Vzdržnost nadomesti socialno pravičnost, državljan pa postane investitor lastne starosti. Domnevna nujnost podaljševanja delovne dobe je pogosto zgolj priročen ideološki konstrukt; enako razmerje med zaposlenimi in

upokojenci bi po drugi svetovni vojni pomenilo »krizo otroških dodatkov«, vendar je takrat prevladovala keynesijanska logika kolektivne odgovornosti.

Posebno poglavje avtor nameni vplivu neoliberalnih reform na trg dela in pričakovanju, da bodo starejši delali dlje. Analizira socialne in človeške posledice: negotovost zaposlitve v poznih letih, pritisk na individualizacijo upokojevanja ter ranljivost tistih, ki zaradi zdravja ali narave dela ne morejo izpolniti novih zahtev. Pokaže, da se s tem poglobljajo neenakosti tako med generacijami kot znotraj njih. Tudi razprave o starostni diskriminaciji so pogosto instrumentalizirane – zakonodaja se uporablja selektivno in pogosto nadomešča nekoč robustnejšo socialno zaščito. Tisti, ki ne morejo delati dlje, so diskurzivno označeni kot neodgovorni, njihova revščina pa postane moralni, ne sistemski problem.

V zaključku avtor poziva k drugačnemu razumevanju staranja – ne kot stroška, temveč kot družbene naloge, ki zahteva kolektivne rešitve. Zagovarja vrnitev k socialni državi, ne kot nostalgijo, ampak kot alternativo tržnemu redu: solidarnost namesto konkurenčnosti, staranje kot skupno dobro, ki zahteva vlaganje v zdravstvo, oskrbo, dostojne pokojnine in razumno prehodno obdobje med delom in upokojitvijo. Namesto poudarka na »zaposljivosti« bi morala biti v ospredju kakovost delovnih mest in pravična delitev produktivnosti. Zavrača logiko, da je treba starost »aktivirati«, saj implicitno razvrednoti pravico do počitka.

Neoliberalizacija starosti tako ni le kritika ekonomskih reform, temveč diagnoza širšega racionalizacijskega

vzorca: tudi zadnja leta življenja postanejo merljiva v učinkovitosti in donosnosti. Neoliberalni pokojninski sistem temelji na individualni odgovornosti, tržni racionalnosti in fiskalni vzdržnosti, zaradi česar je socialna politika podrejena makroekonomski disciplini. Retorika vzdržnosti zamenjuje pojme, kot so solidarnost, univerzalnost in pravica do varne starosti.

Knjiga je zato izjemno uporabno orodje tudi za presojo zadnjih pokojninskih reform v Sloveniji, v katerih je mogoče jasno prepoznati logiko neoliberalnega upravljanja starosti, ter sprememb na številnih drugih področjih nekdanje socialne države.

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