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Authoritarian Neoliberalism, Populism, and Democratic Backsliding: A case study of the PiS Government

Feitsch, Sebastian

Citation

Feitsch, S. (2023). *Authoritarian Neoliberalism, Populism, and Democratic Backsliding: A case study of the PiS Government*.

Version: Not Applicable (or Unknown)

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Downloaded from: <https://hdl.handle.net/1887/3642640>

Note: To cite this publication please use the final published version (if applicable).

Master Thesis
Leiden University
MA International Relations
Global Political Economy
2022/23
Sebastian Feitsch (s2528940)

Authoritarian Neoliberalism, Populism, and Democratic Backsliding:
A case study of the PiS Government

7.6.2023
First Reader: Dr. Rizal Shidiq
Second Reader: Dr. Vera Šćepanović
Word count: 14.997

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1. Introduction

Few phenomena have transformed the political landscape in Europe in recent years like the rise of populism. Political parties characterized by populist stances have garnered increasingly large shares of voters in many countries, such as the “Alternative für Deutschland” in Germany or the “National Rally” in France, becoming driving forces in national and international politics (Statista, 2022). The perhaps most notable case of this phenomenon is Poland, since while the above-mentioned examples generated significant public support, they were nevertheless rarely the primary governing party. In Poland, however, the “Law and Justice” party, (henceforth referred to as “PiS”, following from the party’s native Polish name “*Prawo i Sprawiedliwość*”) has repeatedly been in government since 2005, and provided multiple Presidents. Initially founded as a Christian-conservative party in 2001, the PiS shifted towards right-wing populism in the 2010s and achieved an outright majority in the 2015 election, achieving 37.6% of votes and resulting in the absence of any left-wing party in Polish government for the first time since 1989 (BBC, 2015).

A highly notable consequence of the PiS victory in 2015 were the subsequently enacted judicial reforms and other reform policies which entrenched the power of the government. Prior to this date, many PiS policy proposals from their preceding time in government were rejected by the country’s courts on basis of unconstitutionality. Thus, a central agenda of the party was to influence the judiciary in such a way as to result in a more favorable interpretation of PiS proposals. Specifically, the reforms targeted the composition of the country’s constitutional court through several mechanisms, such as the addition of new members and a new President to the court, lowering of retirement ages for judges, novel bodies overseeing appointment of judges, and finally the so-called “muzzle law” in late 2019, which prevents judges across the country from voicing concerns over the judicial reforms, or the government generally. These actions were met with a broad wave of backlash, ranging from protests by the Polish population to other countries, the EU, and external observer organizations condemning the reforms (Duncan & Macy, 2020; Sadurski, 2019). Zselyke Csaky (2020) of Freedom House even went so far as to call these reforms “waging a war against the judiciary”. Complaints were filed to the International Court of Human Rights, such as in the case of Xero Flor v. Poland, where the court found a violation of Article 6 of the European Convention on Human Rights, the right to a fair trial under a tribunal established by law (ECtHR, 2021). Instead of complying with the ruling of the court, the Polish authorities instead claimed the decision to be “non-existent” in an unprecedented

move, thus manifesting Poland's breaking apart from the European legal order. This short overview of developments seeks to highlight the extraordinary lengths to which Poland, under populist PiS rule, has undermined principles of rule of law and accountability, challenged fundamental liberal principles of the European Union, and transitioned into an increasingly authoritarian regime. The significance of this case for the future of freedom, democracy, and rule of law in Europe is, among other reasons, what prompted the choice of this paper to analyze Poland.

The focal point of this piece lies in trying to explain possible motivations behind this entrenching of government power. The paper assumes a Global Political Economy perspective in analyzing the rise of populism and its relationship with the undermining of core rule of law principles. Global Political Economy (henceforth referred to as GPE) is a multidisciplinary approach, or set of approaches, within International Relations that seek to emphasize the interrelationship between public and private power, or politics and economics, and the social foundations of market society (Gilpin, 2011; Ravenhill, 2014). It therefore incorporates multiple disciplines, such as political science, history, or sociology in addition to economics. The strengths of a GPE approach lie in the combination of a variety of interrelated factors that come together in creating a more robust framework for the analysis of the rise of populism and authoritarianism. The GPE perspective, as adopted by this paper, seeks to highlight, and analyze the permeating nature of marketization and neoliberalism in transforming not only the economy, but states and societies.

The term neoliberalism hereby refers to both a comprehensive set of policy directives and a general political-economic ideology based on free-market capitalism, which proliferated especially since the late 1970s. Neoliberalism intends for economic growth to be achieved through privatization, market liberalization, deregulation, and free trade, with an emphasis on individualism and freedom (Harvey, 2007). Neoliberalism can be identified as the prevailing mode of global economic governance since succeeding embedded liberalism, which had been in place since the post-World War 2 Bretton Woods conference and combined free market principles with national economic intervention and redistributive policies. Neoliberalism then saw the advocacy of a scaling back of such interventionist policies, with international institutions like the International Monetary Fund or the World Bank advocating for structural adjustment programs in favor of trade liberalization and privatization (Cammack, 2022; Harvey, 2007).

When applying a GPE perspective to the rise of populism in Poland, special attention should be paid to the role of the "shock therapy" state transformation in 1989. Following the

end of Communism in Poland, the country undertook a series of radical state transformations, also coined the Balcerowicz plan. The core tenets of this plan entailed the restructuring of the economy from a centrally planned state-controlled approach under Communism, towards the adoption of capitalist free-market policies and the rapid opening up of the Polish markets to foreign capital. The term shock therapy hereby refers to the fact that the reconfigurations were to take immediate effect, rather than allowing for a longer transition phase (Kenton, 2021; Lech, 2015). Due to the nature of these transformations, it can be concluded that they were directly informed by neoliberal principles. The economic and socio-political consequences of this reform are highly interesting. On the one hand, significant Gross Domestic Product (GDP) growth set in from 1992 onwards, continuing at a rapid pace until the Covid-19 Pandemic in 2019, with Poland experiencing higher aggregate annual GDP growth than all other European countries during that period. On the other hand, however, the reform saw a stark increase in unemployment and relatively worsening conditions for many members of the lower-middle class (Appel & Orenstein, 2016; Jasiewicz, 2017).

Appel and Orenstein (2016) additionally point to the remarkable persistence of neoliberalism in Poland, even in the face of challenges such as the 2008 financial crisis. In a similar vein, Shields (2021) highlighted a paradoxical relationship between neoliberalism and populism in Poland. He argues that while discontent about adverse effects of marketization help explain the rise of populism, welfare reform policies enacted by PiS enable the reproduction of neoliberalism, rather than challenge it, despite having the appearance of solidarist counter-neoliberal state intervention at the surface. Skepticism of PiS reforms embodying a break with neoliberalism are reflected across various assessments (Jasiewicz, 2017, Konat, 2019). Taking this paradoxical relationship between neoliberalism and populism in Poland as a starting point, this paper identified a research gap in this area, and asks the Research Question:

Why did authoritarianism and illiberal reforms proliferate following the rise of populism in Poland despite continued commitment to neoliberalism?

2.1 Economic Reforms

Prior to the 1989 reforms, Poland was a member of the Soviet Bloc and was governed as de-facto one party Communist state. Due to the strong Soviet influence, it remains debated whether Poland can be conceptualized as a truly sovereign state during the postwar era (Paczkowski, 1999). The two decades leading up to the shock therapy saw Poland experience several economic hardships, such as mounting foreign debt or shortages of essential goods, which in turn led to growing social unrest and resistance against the regime (Kemp-Welch, 2008).

An event which lent civil discontent considerable momentum was the election of Polish cardinal Karol Józef Wojtyła as Pope John Paul II in 1978. Due to his critical stance towards Communism, in conjuncture with his role as a powerful identification figure, especially in his native Poland, John Paul II has been credited as being an important catalyst in weakening the Communist regime (Ash, 2005). The dissent towards the regime culminated in the founding of the *Solidarność* (Solidarity) movement, an anti-authoritarian social movement which later doubled as the first ever trade union recognized by the state. The movement amassed a membership of around 10 million within its first year, thereby becoming a strong political force and a key player in anti-Communist efforts. Despite attempts by the governing worker's party to weaken the Solidarity movement, for example by instating martial law, the movement survived and retained its importance, also aided through foreign support by the United States or the Vatican (Judt, 2006; Paczkowski & Manetti; 2015). In 1989, due to worsening economic struggles and escalating social unrest, manifested in widespread and ongoing strikes, the government conceded to hold talks with the opposition, including *Solidarność*. As a result, the political system would be transformed entirely with the introduction of a Senate and Presidency, thereby paving the way for free elections. Lech Wałęsa became the first democratically elected Polish head of state since the interbellum (Porter, 1999).

In addition to these political reforms, the 1989 transition also entailed far-reaching economic reforms. These were designed by an expert committee consisting of leading Polish economists such as Leszek Balcerowicz or Stanisław Gomułka, also including American economist Jeffrey Sachs. The latter specifically advocated for a rapid privatization of state-owned assets as well as opening of Polish markets to international producers and a general retreat of the government in favor of market mechanisms (Kolodko, 2000; Sachs et al., 1992). The central tenets of the finally enacted Balcerowicz Plan entailed several measures designed

to relinquish state control, which during the Communist era, was distinctly characteristic of the regime. As Shields (2007) noted, a primary aim of the reform process was to restructure the government in such a way as to weaken its control, both politically and economically. By allowing for democratic elections and the inflow of transnational capital, the new government would be significantly less dominant. Concrete measures of the Balcerowicz Plan include, but are not limited to, a general transformation of ownership rights in favor of private property, privatization of previously state-owned enterprises, freedom to create new firms and enterprises and allow free trade and price-setting, attracting foreign capital through zloty convertibility and the creation of a capital and labor market (Kowalik, 2011). Due to these characteristics, the reform policies can be characterized as distinctly neoliberal.

Following a short period of transition recession in the first years after the reforms, Poland's economy started to grow rapidly from the mid-1990s onward, quickly surpassing other ex-Soviet Bloc states (Gomułka, 2016; Shields, 2007). A frequently drawn comparison is Ukraine, whose GDP per capita in 1990 was almost identical to Poland at around 1700\$, yet by 2017, Poland stood at around 14.000\$, while Ukraine only reached roughly 2700\$ (Kupfer, 2018). This can be accredited to the fact that following the reforms, Poland was swift in reorienting itself towards the global market, with newly introduced competition of foreign products bringing about an end to shortages. As additional parameters of beneficial outcomes resulting from the shock therapy, quality of housing and infrastructure, an increase of 10% in life expectancy and widespread technological advancements can be noted. The perhaps greatest success of the transition however lies in the aversion of a financial crisis following the drastic changes. Banks, pension funds, insurance companies and stock exchanges all remained relatively stable and no crisis in terms of public finance ensued. The culmination of these achievements ultimately played a large part in what allowed for Poland's accession to the EU in 2004 (Gomułka, 2016).

Therefore, it can hardly be disputed that the shock therapy reforms of 1989 were a success in macroeconomic terms. It is important to keep in mind the situation in Poland shortly before the transformation was enacted. The Polish economy throughout the 1980s had become stagnant. Over 600.000 Polish citizens of working age left the country during this timeframe (Hardy, 2015). During the decade, there was virtually no GDP per capita growth and there were multiple years in which the Polish economy shrank rather than grew. Foreign debt had reached \$18 billion by 1980. Centrally planned prices for consumer goods were becoming more volatile, with abrupt spikes being followed by a general wave of planned price rises of consumer goods (Paczkowski et al., 2007). These factors played a large part in

the series of strikes and protests in the country and ultimately the foundation and growing influence of Solidarność, which culminated in the reforms. Keeping these circumstances in mind, the transformation and growth of the Polish economy becomes truly remarkable. Not only did the transformations allow for the most rapid economic development of all post-Soviet states, from 1989 until 2018, Poland had the fastest growing economy of any European country, having multiplied its GDP by a factor of eight, culminating in a GDP of €524 billion in 2018 (Fredriksson, 2019; Škare & Porada-Rochoń, 2019).

Two things can be concluded from this section. Firstly, against the backdrop of the severely struggling economy during the Communist era, the transformation following from the Balcerowicz Plan can be evaluated as a significant macroeconomic success story, which not only opened the doors for the 2004 EU accession and thus further economic growth, but also succeeded in averting a significant financial crisis. Secondly, not only the Polish economy, but also the Polish State experienced a significant transformation, with democratic reforms being essential cornerstones of this development, breaking with the repressive nature of the Communist de-facto one-party state.

2.2 Democratic consolidation and democratic backsliding

Economic and political reforms thus went hand in hand in restructuring the country entirely, reorienting itself towards the Western liberal-democratic order. This general reorientation of Poland would be further cemented in the two decades following the 1989 reforms. After the dissolution of the USSR in 1991, the Warsaw pact was subsequently also disbanded and the last of the Soviet military personnel left the country. Rather than entering the Warsaw pact's successor, the Collective Security Treaty Organization, Poland sought to join the North Atlantic Treaty Organization (NATO) (Paczynska, 2005). In addition, Poland became a founding member of the Visegrád group, which additionally features Hungary, Slovakia, and the Czech Republic. The alliance was founded from a shared desire to break away from Communism and towards implementing policies and reforms which would ultimately lead to membership in Western organizations (Dangerfield, 2012). NATO swiftly expressed its openness towards the accession of the Visegrád group. In launching the Partnership for Peace program, NATO looked towards integrating several new members, with an emphasis on Eastern European states and to encourage the development and strengthening democracy, transparency, accountability, and active participation in these countries (Borawski, 1995). Following several years of joint military exercises and others

forms of cooperation and rapprochement, Poland officially joined NATO in 1999, on the 50th anniversary of the organization (Polish Ministry of National Defense, 2019).

Democratic consolidation in Poland was also a priority in view of ambitions to join the European Union. This concept refers to the process by which regimes, after transforming into a democratic system, strengthen mechanisms and institutions designed to sustain the democratic mode of governance in the long run (Linz & Stepan, 1996). Pluralism of political parties, safeguards for free and fair election as well as an independent judiciary can be identified as characteristics of the process of democratic consolidation. Accession talks with the EU started already in 1989, yet the process took several years due to the requirements set out by the Copenhagen criteria. Thereby, the 1990s saw several additional political and economic reforms in addition to the shock therapy. Specifically notable were the introduction of the small constitution in 1992 and ultimately the novel constitution of Poland in 1997. The 1997 constitution saw a general redefinition of the Polish nation in terms of democratic national principles, such as equality, freedom, and tolerance, rather than previous ethnocentric definitions (Kostecki, 2022). Some central tenets of these comprehensive constitutional amendments were the enshrinement of liberal-democratic and free market commitments, such as free elections, private property, or the right to form trade unions.

Several reforms were targeted specifically at democratic consolidation and the alignment of institutional frameworks to EU standards. The establishment of separation of powers as well as an independent judiciary were fundamental cornerstones in this undertaking. Significant electoral reforms were also undertaken. In addition to the introduction of the novel political bodies of President and Senate, the voting age was lowered to 18 and an independent electoral commission was founded to ensure the free and fair conduct of elections. Both bodies of the bicameral parliament, the Sejm (lower house) and the Senate (upper house), are to be elected via proportional representation. Transparency and accountability were further goals of the democratic consolidation process, with several measures taken to combat corruption, including the establishment of an anti-corruption agency, stricter financial disclosure rules for public officials as well as the abolition of repressive media laws. Another key aspect was the enshrinement of respect for human rights into the constitution, with prohibitions on torture and corporal punishment being steps to safeguard the commitment (Gerschewski, 2013; Jasiński, 2008; Szczerbiak, 2016).

As a testament to the success of these reforms, Poland officially joined the European Union, alongside the other members of the Visegrád group in 2004 (Dangerfield, 2012). It is important to note that during the following decade, democratic consolidation continued, the

above-mentioned measures evolved further and, to large degrees, proved to work. The independent observer Freedom House found that, while individual parameters were subject to annual fluctuations, the general level of democracy and freedom in Poland remained relatively stable, with the quality of electoral processes and local democratic governance being praised specifically (Czeńnik, 2013). Poland saw over 100 parties during its first election and subsequently experienced center-right, centrist, as well as left wing governments during the first several tenures following the 1989 transformation (Millard, 2006).

This period of relative stability began to stagger in 2015, with the election victory of the PiS, leading to the first outright majority government since the 1989 reforms. Having previously been in a coalition government from 2005-2007, the party had already been accused of attempting to enact illiberal reforms, yet significant proposals were dropped or thwarted by the constitutional tribunal (Bustikova & Guasti, 2017). After the electoral successes of 2015, with the PiS winning the Presidential election first and the Parliamentary election shortly thereafter, the party found itself in a strengthened position to enact judicial reforms due to this constellation, as judges to the constitutional tribunal are proposed and elected by the Parliament and approved by the President. Prior to the Parliamentary victory, President Andrzej Duda refused to swear in several judges proposed by the then-governing centrist Civic Platform (PO). Following the PiS Parliamentary victory, the Sejm proposed a set of five new judges, which were immediately approved by Duda, yet the President of the Constitutional Tribunal itself halted the accession of these judges to the tribunal.

To counteract this, the PiS-dominated Sejm passed a law which comprehensively re-structured the composition and workings of the constitutional tribunal in favor of the PiS-appointed judges. For one, the law increased the number of judges to be present at minimum to make a ruling from 9 to 13 out of 15, thus effectively forcing the tribunal to include the PiS-appointed judges. Furthermore, it was decided that court rulings had to be decided by a qualified majority, rather than previously by simple majority. The law also introduced the possibility of dismissal of constitutional court judges by the President, Minister of Justice, or a majority in the Sejm (Sadurski, 2019). A ruling by the constitutional court in absence of the PiS-appointed judges, calling the law unconstitutional, was subsequently ignored by the government, on the grounds of violating the very law the ruling criticized (The Guardian, 2016).

Additional measure exerting political control over the judiciary were subsequently enacted. In 2017, a law was passed which gave the Sejm substantive power to influence the National Council of the Judiciary. Composed of 25 members in total, comprising 15 judges,

six representatives from the Sejm and Senate, as well as the Presidents of the Supreme Court and Supreme Administrative Court in addition to an appointee by the President, the body oversees judicial appointments in all of Poland. By granting the Sejm the power to appoint the judge members of the council, which had previously been the task of judicial assemblies, the PiS-dominated Parliament could release the 15 sitting judges and replace them with party-nominated judges. This move thus gave the Sejm comprehensive control over all judicial appointments (Duncan & Macy, 2020).

In 2019, the Sejm enacted another law infringing the independence and rights of judges, including those on the Supreme Court, namely the so-called “muzzle law”. This move provided the Supreme Court disciplinary chamber, which was founded two years prior by the PiS Minister of Justice, with the power to penalize judges over any engagement in “political activity”, which refers to criticism over judicial reforms, the independence of the National Council of the Judiciary, or any dissent towards the government or reform policies at all. Punishments range from fines all the way to the termination of the judge’s position (Pech et al., 2021). Criticism over these reforms have been voiced both domestically, in the form of protests, and abroad, with numerous observer organizations on top of the European Court of Human Rights or the European Union sharply condemning the actions (Duncan & Macy, 2020; ECtHR, 2021). However, the Polish government has sternly objected to criticism and continued its course (Pech et al., 2021).

These far-reaching judicial reforms were not the only policies enacted by the government which can be classified as democratic backsliding, which describes the process of a democratic system assuming increasingly authoritarian characteristics and thus reverting on previous commitments to democratic principles (Bermeo, 2016). Also coined autocratization, the concept thus refers to policies or reforms which undermine democratic principles such as public contestation, political pluralism, rule of law and other policies aimed at entrenching government power.

Another important element of PiS-consolidation of power was the expansion of control over the Polish media landscape. Multiple policies were enacted which significantly reduce media freedom in Poland. For one, the government enacted the Broadcasting Act Amendment, which allows it to choose appointments for heads and supervisory positions of public media companies. In a similar vein as the re-structuring of the National Council of the Judiciary, the amendment also shortened existing tenures of stakeholders, allowing the government to replace influential positions in public media entities with more favorable appointees. This move subsequently deprived many public media outlets of independence

and pluralism, invariably making the overall media landscape more approving of the PiS-government (Guzek & Grzesiok-Horosz, 2022). Analyses found that TVP, the country's largest public broadcast television, has seen a drastic change in course since the enactment of the law. For example, coverage prior to the 2019 EU election saw close to every news piece about the PiS showing the party in a positive light, whereas reports on the opposition were consistently negative (Henley, 2021). By introducing a new media authority, for which appointments are also government-controlled, media oversight in Poland is now also firmly in the hand of the PiS. Lastly, media outlets outside of direct government control have faced significant economic and legal pressures, such as changes made to regulations concerning radio or TV licenses (Guzek & Grzesiok-Horosz, 2022). These efforts have thus brought about significant transformations of Poland's media landscape, granting the government vast influence to enhance favorable coverage and silence criticism.

The final element of democratic backsliding in Poland to be discussed here relates to increased pressure on Non-Governmental Organizations (NGOs). The PiS-government enacted legislation which limited their sphere of operation, including greater intervention in NGO's internal affairs. Another element of the legislation pertained to limiting NGO's ability to receive foreign funding. This move follows a similar doctrine as the "repolonisation" of the media, arguing that increased government control was to counteract foreign intervention over Polish national affairs. Additionally, the heightened control over public media facilitated targeted campaigns against certain NGOs, for example those involved in promoting LGBTQ-rights, or women's reproductive freedom (Pospieszna & Pietrzyk-Reeves, 2022). This highlights how the individual elements of democratic backsliding and increased consolidation of government power overlap and interact.

3. Analytical framework

Returning to the research puzzle, the aim of the upcoming section is to gain an understanding of *why* Poland undertook the turn from democratic consolidation towards democratic backsliding from 2015 onward. The enabling factor for the enactment of the illiberal reform policies was the outright majority which the PiS achieved in the 2015 elections, prior to which they adopted increasingly populist strategies (Melito, 2021). Therefore, the starting point for this section is the review of existing explanations about the rise of populism in Poland. Arguing that these theories provide important insights yet are ultimately insufficient for accounting for an understanding of the authoritarian reforms, the paper then turns to the theory of authoritarian neoliberalism as the appropriate framework for the investigation of the research question.

3.1 Existing explanations on the rise of populism

Before diving into the academic literature on why the rise of populism happened in Poland, the term “populism” first needs to be clarified. According to Berman (2021), who offers a conceptually useful definition of the term, it refers to an umbrella term of political stances that emphasize divisions in society, to be utilized as a driving force for political support and subsequent activity. Specifically, the societal cleavages that are defined, often revolve around dichotomous views of “the people” and “the elite”. In this regard, populist politicians often portray themselves as being anti-establishment, emphasizing the needs and interests of “the people”, which are claimed to be neglected by “the elite”. Other forms of populist rhetoric include, but are not limited to, ethnic or communal divides between a nationalist in-group and a foreign out-group, mostly immigrants (Berman 2021).

Thus, among the multiple theories and explanations regarding the causes for an increase in populism, increasing anti-immigrant sentiments or discontent with the governance of the state feature prominently (Sandrin, 2021). Importantly however, while there is a certain degree of overlap in issue areas identified as drivers of populism, what becomes increasingly clear from a review of the literature on the topic is the highly country-specific nature of the phenomenon. It is important to note that populism is not inherent to a particular overarching political ideology and can thus be adopted by actors from any side of the political spectrum. In terms of categorizing the Polish case, it can be identified as an instance of right-wing populism, manifested through anti-immigration and xenophobic stances, anti-LGBTQ policies, and illiberal and autocratic tendencies, exemplified various reform policies

(Sadurski, 2019). Having laid out a conceptual understanding of populism, and its nature in the Polish case, the review now turns to several theoretical arguments about the rise of populism in Poland.

The first explanation focuses on the relationship between right wing populism and religion. Poland is one of the most religious countries on earth, with upwards of 96% of the population belonging to some religious association, the Roman Catholic Church posing the overwhelming majority with 92% of Poles belonging to this denomination (Statistics Poland, 2020a). Herbert (2019) argues that in the wake of the electoral success of PiS in 2015, invoking religion was an important part of the increasingly populist rhetoric. Concretely, this process sought to generate support for a populist call to re-adjust societal power in favor of “the people”, with religious sentiments being called upon in the attempt to align them with populist arguments. This approach also intended to invoke religious beliefs in the discrimination of the LGBTQ-community and the marginalization of immigrants (Szelewa, 2021). The core of this argument is the idea that Polish populism actively and specifically sought to invoke religion as a reason to support their cause, perhaps best exemplified by a quote from a PiS spokesperson Elżbieta Witek, who argued that “A good Christian is someone who helps, not necessarily by accepting refugees” (in Cienski, 2017).

This quote builds a bridge to the second theory to be discussed here, namely relating to exclusive-nationalist sentiments being mobilized by Polish populism. According to this theory, in the wake of increased cross-border mobility following European integration, a new sociocultural cleavage emerged. Specifically, it is one between proponents of further integration, implying free movement of people and the diversification of culture and ethnicity within European countries, versus opponents of further integration, meaning the rejection of this process and a preference for a system of more strongly sovereign nation-states, with each, and especially one’s own, ideally consisting of a homogenous and hegemonic ethnic and cultural group (Ivarsflaten, 2008). In this regard, Polish populism is said to have capitalized on this emerging cleavage, instrumentalizing concerns of the citizens into populist rhetoric that subsequently strengthened national identities and reinforced in-group versus out-group thinking (Melito, 2021).

The argument of this review is that these explanations, while certainly offering relevant insights, are nevertheless insufficient in accounting for a comprehensive picture of the rise of populism and its relationship with the subsequent reforms in Poland. The reason for this lies in their issue-specific focus, being too narrow to account for other possible explanations, for example economic grievances of the population, which also features among

the academic literature on the rise of populism (Balfour, 2017; Berman, 2021). Following this logic, deepening inequality in the population, insecure working conditions for the laboring class population and other factors causing economic dissatisfaction can serve as a predictor for a proliferation of populism. Specifically, discontent with the effectiveness of government policies and governing parties to respond to the economic concerns of citizens can serve as a powerful opportunity for populist politicians to instrumentalize economic grievances, generating support for their cause (Berman, 2021).

As mentioned in the introduction, Stuart Shields (2021) found that there exists a paradoxical relationship between populism and neoliberalism in Poland, in that economic grievances do serve as a predictor for the rise of populism, but the PiS government's response nevertheless largely reproduced rather than challenged neoliberalism. To make sense of this paradoxical relationship, a closer look needs to be paid to theoretical explanations on what factors motivate political elites to enact authoritarian reform policies.

3.2 Authoritarian neoliberalism

A good starting point for the conceptual understanding of authoritarianism is Juan J. Linz' (2000) identification of possible mechanisms for the emergence of authoritarian regimes. One of the central factors identified by him is the breakdown of democratic institutions, which subsequently creates a power vacuum which can be exploited towards a stronger exertion of political control. Contributing elements to this process are widespread corruption, ineffective rule of law and a crisis of legitimacy of the previous government. Other potential factors leading to the proliferation of authoritarianism are economic and social instabilities or transformations, including rapid industrialization or modernization, during which increased authoritarianism is framed as a means for maintaining social order and control. Invoking ideological tenets to rally supporters around a common set of beliefs can also serve to consolidate political power (Linz, 2000).

While Linz' (2000) categorization offers useful insights into the characteristics and motivations of authoritarian regimes, the focus of this paper relates specifically to the interrelationship between global political economic factors, which is why this dimension also needs to be integrated more closely. A perspective on this relationship can be found in Ian Bruff's (2014) theory of authoritarian neoliberalism. The starting point for the development of this approach was the identification of a gap in the existing literature both on authoritarianism as well as neoliberalism, especially regarding the previous separation of the

two. Bruff's (2014) work builds on preexisting notions of authoritarian statism and authoritarian populism during the 1970s and 80s, adapting the general framework towards the era of neoliberalism and its nature in the 21st century. In some key respects, the theory is also building on Linz's (2000) characteristics of authoritarianism, while complementing both the explanatory factors and features of authoritarian governance with the influence and relationship with recent developments in the global economic system. The core of the framework is the understanding that authoritarian neoliberalism describes a novel mode of governance which developed in the last several decades as "a response both to a wider crisis of capitalism and more specific legitimation crises of capitalist states" (Bruff, 2014, p. 124).

In that sense, internal reconfigurations of the state towards greater authoritarianism, such as "constitutional and legal changes that seek to insulate it from social and political conflict" (Bruff, 2014, p.113) are a response specifically to crises of capitalism. Such crises can take several forms, such as external shocks like the 2007-08 financial crisis and "the state being unable, despite "the best will in the world," to reverse processes such as greater socioeconomic inequality and dislocation" (p.115). In that sense, concerns over the sustainability of the neoliberal system, manifested, for example, in unequal distribution of newly generated wealth, are in turn what prompts political elites to turn to upholding the status quo by entrenching their power.

Bruff and Tansel (2019) assert that the neoliberal system is inherently political and thus should be understood as such. Thereby, the contemporary governance of capitalism "tends to reinforce and rely upon practices that seek to marginalize, discipline and control dissenting social groups and oppositional politics rather than strive for their explicit consent or co-optation" (Bruff & Tansel, 2019, p.234). Tansel (2017) expanded on this notion by explaining how the practice of authoritarian neoliberalism specifically seeks to limit spaces for popular resistance towards different dimensions of neoliberalism, thus expanding the state in terms of social control. This returns to a crucial point made by Bruff (2014) namely that authoritarian neoliberal regimes are characterized by a state which is both expansive and minimal. It is expansive in that it seeks to strengthen the power of the government over civil society via constitutional and legal changes, while at the same time adhering to neoliberal and capitalist tenets. Authoritarian neoliberalism can thus be understood as the move towards a mode of governance of the state which entrenches elite power, exerts control over opposing voices and seeks to sustain neoliberalism. Fundamentally, it represents a response towards crises of capitalism.

Ernesto Gallo (2022) subsequently expanded on the conceptual understanding of authoritarian neoliberalism, arguing that there exist three relatively distinct sub-categories, namely traditional authoritarianism, technocracy, and populist nationalism. The last one of those is of special interest for the research focus of this paper, as it expands on Bruff's (2014) integration of the concept of populism into the explanatory power of the theory of authoritarian neoliberalism. As Gallo (2022) points out, populist nationalism is a specific kind of authoritarian neoliberalism, namely one which is characterized by the "rule of the people" is because the democratic election of a party serves as a prerequisite for that party's coming into power which in turn is a prerequisite for the enactment of illiberal reforms.

Another important point can be found within Gallo's (2022) piece, namely that anti-globalist stances of populist nationalist regimes do not necessarily imply a rejection of neoliberalism, but rather a rejection of certain consequences of globalization, especially regarding migration. He argues that these-anti globalist stances can manifest in the presence of "welfare chauvinism", or in other words, excluding non-nationals from the distribution of social welfare, while at the same time remaining committed to neoliberalism. He expanded on the interrelationship between nationalism and neoliberalism, arguing that increasingly nationalist sentiments can also embody a "response to a crisis". He shows that the populist nationalist variant of authoritarian neoliberalism can promote the idea of "neoliberalism in one country", aware of the inherent contradictions of this notion. This means specifically that "pro-market policies in fact intertwine with nationalism and an exclusionist 'ethnicism'", thus seeking to instrumentalize the benefits of open market policies towards a nationalistic in-group (Gallo, 2022, p.566). This again highlights the interlinkages between nationalist populism, authoritarianism, and neoliberalism and shows how these are not separate entities but can become interrelated factors in allowing for a more comprehensive understanding of underlying factors explaining democratic backsliding.

It's important to note that authoritarian neoliberalism does not provide a framework which neatly resolves the contradictions between populism and neoliberalism as identified by Shields (2021); or other contradictions such as "neoliberalism in one country" (Gallo, 2022). Rather, it provides a framework which helps to understand how democratic backsliding can happen *despite* these contradictions, with the invocation of nationalist sentiments and the defense of supposed national interests playing an important part.

Ultimately, what can be concluded from the arguments of authoritarian neoliberalism is that an explanatory factor as to *why* political elites choose to enact authoritarian reforms pertains to this move allowing said elites to maintain a state of control in the face of crises of

capitalism, to which democratic backsliding is a response to. Additionally, this allows them to reproduce and sustain the neoliberal system on their own terms which allows for a synergy with other ideologies such as populism and nationalism. Crises of capitalism and crises of legitimation by capitalist states are thus causing dissatisfaction of voters, which lends momentum to populist movements. This in turn enables populist actors to pass desired reforms, which are framed in the language of doing what is best for the country and its people (Bruff, 2014; Bruff & Tansel, 2019; Gallo, 2022).

4. Research Design

Having laid out the predictions of authoritarian neoliberalism on what factors explain the rise of authoritarianism, the focus now turns to the conduct of an empirical analysis which seeks to corroborate the explanatory factor. Thereby, the methodology used in this paper takes the form of a theory test using quantitative and qualitative observations. As Mahoney (2015) pointed out, the general formula for process tracing research is “what X caused Y in Z”. X hereby refers to the explanatory variable, Y to the phenomenon and Z to the case. This formula is reflected in the Research Question. The phenomenon to be analyzed refers to the proliferation of authoritarianism and illiberal reforms, the case being Poland. The aim of the analysis is to corroborate the explanatory variable X, which needs to be present prior to the phenomenon to potentially establish a causal relationship. As discussed in the previous section, authoritarian neoliberalism predicts that autocratization can be understood as a *response to crises of capitalism*. As has been discussed earlier, the Balcerowicz plan can be identified as being directly informed by capitalist and neoliberal principles, thus crises of capitalism simultaneously reflect crises of the effects and long-term legacies of the market reforms of 1989 onward.

To test this prediction, a series of hoop tests will be conducted along various dimensions of the variable “crises of capitalism”, which has been identified as the main predictor. Hoop tests are designed to test whether a given piece of evidence in support of a hypothesis is present within a case (Mahoney, 2015). The evidence in this case thus refers to the presence of crises of capitalism in Poland after 1989, following the market reforms, and prior to 2015, when the outright majority PiS government was elected.

This means that the absence of such evidence, or failure to “jump through the hoop” serves as a strong indication that the hypothesis is *not true*. Importantly however, successful passing of the hoop test, or in other words, finding evidence of the presence of the pre-

determined explanatory variables, does *not* unequivocally *prove* the hypothesis. It is not the argument of this paper that, in case of absence of crises of capitalism in Poland, democratic backsliding would have been theoretically impossible. Rather, it is the assertion that such crises potentially served as a *sufficient contributing condition* towards the proliferation of autocratization. As Mahoney (2015) explained, the strength of hoop tests as a methodology is derived from both the difficulty of passing the hoop as well as the number of hoops passed. In other words, “easy hoop tests make use of observations that are ordinary, common, or expected” (p.208). Therefore, should a hypothesis pass just one “easy” hoop test, it does not lend strong support to the validity of the hypothesis. However, if multiple more difficult hoop tests are passed subsequently, then strong support for the validity of the hypothesis can be concluded, even if it is not unequivocally proven.

Thereby, should the analysis find that several dimensions of the explanatory variable “crises of capitalism” did occur in Poland prior to 2015, this serves as a starting point towards the identification of this variable as a contributing condition for the rise of authoritarianism and illiberal reforms. Additionally, it will be investigated whether voter behavior and PiS actions can be said to be responding to these crises, as to attain a greater degree of inference. If the hoop tests for the presence of various crises of capitalism are passed and findings support the claim that there existed responses to these crises in the form of autocratization, then the hypothesis can be considered a sufficient contributing condition towards the proliferation of democratic backsliding in Poland. The variable “crises of capitalism” is operationalized along three dimensions for the analysis. These stem directly from Ian Bruff (2014) and his identification of characteristics of the emergence of the authoritarian neoliberal mode of governance, namely:

- a. Widening socio-economic inequality
- b. Austerity
- c. Displacement

The next sections will thus investigate these three dimensions of the explanatory variable “crises of capitalism” and test whether they have in fact been present in Poland prior to the election of the PiS government in 2015. Additionally, each section contains an examination of whether these crises also influenced voter and party behavior. The goal of the analytical section is to corroborate the explanatory power of authoritarian neoliberalism in the case of Poland in view of the research question.

4.1 Widening socio-economic inequality

The starting point for the analysis thus takes the form of an investigation of whether widening socio-economic inequality can be found as resulting from the market reforms of 1989. As has been documented, the macroeconomic effects of the reforms have been remarkable, with Poland surpassing any other European country in terms of relative GDP growth and multiplying its GDP by factor eight in the three decades following its implementation (Fredriksson, 2019; Škare & Porada-Rochoń, 2019).

Despite the significant increases in Gross Domestic Product, it remains debated whether the shock therapy can truly be considered an all-out success. A starting point for this skepticism can be found in the way in which success is measured in the first place, namely the metric of GDP; or GDP per capita. The principal criticism is aimed at the use of the metric as an “all-encompassing unit to signify a nation’s development, combining its economic prosperity and societal well-being” (Kapoor & Debroy, 2019). While GDP certainly measures the output of a country’s economy, complete reliance on it to measure a country’s development discounts essentially all side effects, such as pollution and environmental degradation, or potentially negative effects on income equality. Thereby, GDP paints a fundamentally incomplete picture about the actual impact and legacy of the economic reforms. A closer look needs to be paid to *how* the gains from the economic reforms were distributed among society.

Shields (2007) remarked that the reforms have resulted in the formation of a new grand bourgeoisie which consists of old bureaucrats and new capitalists, while developments in the lower income brackets have been much slower. Similar conclusions were also drawn in a study conducted by Agnieszka Paczynska (2005). She found that as a direct consequence of changes brought about by the economic reforms “there has been a growing bifurcation of the Polish society into a small, well-educated, urban sector and the mostly poor, lacking marketable skills residents of small towns and rural areas” (Paczynska, 2005, p.573).

In addition to this growing divide within the country, the aggregate poverty levels also rose significantly. In the transition recession years immediately after the reforms, Poland experienced a wave of mass unemployment following numerous business closures resulting from an inability to cope with foreign competition and insufficient financial subsidies from the state. The unemployment rate was rising nearly continuously throughout the 1990s, reaching over 20% in 2003 (Statistics Poland, 2023). This development was paired with a significant decline in real wages, as business were prioritizing profitability, thus oftentimes

tolerating, or even encouraging subpar health and safety regulations (Shields, 2007). By the end of the 1990s, income inequalities had deepened severely. Several studies showed that Poland had transitioned into one of Europe's most inegalitarian countries, surpassed only by Albania and Russia (Golinowska, 1999).

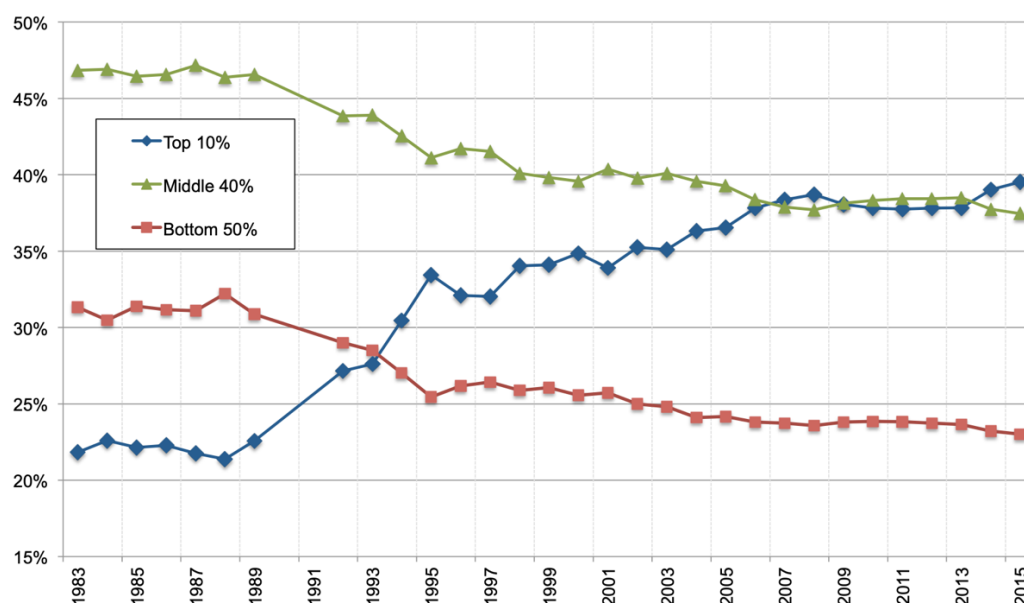
This trend can be highlighted by the alarming rate at which the share of people living below the threshold to “maintain a decent standard of living” set by the National Ministry of Work and Social Affairs was rising. This figure stood at 20% in 1992, but reached 57% by 2004, indicating that despite significant amounts of wealth generated through the market reforms, living conditions had indeed worsened for a large share of the overall population. In a similar vein, the share of people living below the “minimum to sustain life” reached 9.6% in 2002, more than doubling from the mid-1990s, while managerial salaries kept on rising (Shields, 2007). It can therefore be concluded that, in the years immediately after the market reforms, inequality was rising significantly.

Returning to Paczynska's (2005) finding of a growing bifurcation in Polish society, it can be concluded that this divide persisted in the long run. This continuance was even admitted to by shock therapy architect and proponent Stanisław Gomułka (2016). He concluded that, as of 2014, economic progress had indeed been largely concentrated in urban areas, and roughly one third of the Polish territory, notably rural parts of the country, still experienced levels of unemployment consistently over 20%. This figure thus stood in stark contrast to the national average, which fluctuated around 11% by the end of 2014 (Statistics Poland, 2023). This divergence in unemployment highlights one facet of the growing urban-rural divide which can ultimately be traced back to the consequences of the 1989 market reforms.

When looking at developments in income shares in the timeframe from 1989-2015, there exists a clear trend towards deepening socioeconomic inequality. Whereas the Gini coefficient for income inequality stood at 0.27 in 1990, it reached 0.45 by 2015 (Owczarek & Szymalski, 2019). When looking at Figure 1, it becomes apparent that with the advent of the shock reforms in 1989, the income share of the top 10% earners increased dramatically, while both the middle 40% and bottom 50% experienced near continuous decline. The data on income shares thus substantiates Paczynska's (2005) and Shields' (2007) arguments about a bifurcation resulting from the shock therapy. Moreover, wealth inequality had been growing even more significantly than income inequality, insofar that by 2016 “the top 10 per cent of the most affluent households held as much as 41 per cent of the total net assets, while the net

assets of the bottom 20 per cent of the poorest households accounted for barely 1 per cent of all household assets” (Krukowska, 2018).

Figure 1: Income shares in Poland 1983-2015 (Bukowski & Novokmet, 2018, p. 15)



A factor which helps explain the growing inequality can be found in the rising share of precarious labor relations. The share of workers employed through temporary contracts rose from less than 5% during the 1990s to well over 20% by 2005 (Konat, 2019). In 2014, 27% of young Poles were employed via temporary contracts, a subset of which being informally known as “junk contracts”, indicating wages which are barely enough to survive on, in addition to offering little to no benefits or social security. The nature of the temporary contracts further increases the risk of poverty, as they offer little predictability and stability (World Bank, 2014). In addition, by 2012 up to one third of Polish companies were employing workers in off-the-books working arrangements, thereby also exposing large shares of workers to precarious conditions (Konat, 2019).

Another relevant argument concerning the origins of this bifurcated trajectory of wealth generation following the market reforms was made by Zeniewski (2011), who found that the shock therapy, despite being initially led by the momentum of the *Solidarność* movement, has subsequently been enacted and directed by exogenous elites representing the interests of transnational capital, rather than a solidarity-centered bottom-up approach. The nature of the reforms took wind out of the movement’s sails and led to the transformation of *Solidarność* into an acquiescent actor within the neoliberal system, thus losing vast shares of

its peak membership and diverting many of its initial goals related to worker emancipation and social justice (Zeniewski, 2011). This can be connected to a finding by Bernaciak, Duman & Šćepanović (2011) who studied how unions can play a part in shaping reform processes in post-Communist transition. It was concluded that public sector unions in Poland showed resilience in the face of pressure by external actors to cut down on public spending and emphasized their ability to influence welfare reforms in their own sectors. However, they too found that “Polish unions have fought the attempts at welfare state restructuring not as social partners in a broader sense but as employees of particular sectors defending their ‘property rights’ to employment and work-related benefits” (Bernaciak, Duman & Šćepanović, 2011, p. 377). This finding thus corroborates the argument about labor movements having transitioned towards acquiescence to the neoliberal system. Generally, it can be noted that union membership did decrease dramatically following the reforms. “While in 1990, 36.7 percent of wage and salary earners belonged to labor unions, by 2012 the figure stood at just 11.6 percent” (Konat, 2019). Thus, declining union membership, in conjuncture with union’s struggle to “reassert their relevance in the public arena or to expand their agenda to new challenges” (Bernaciak, Duman & Šćepanović, 2011, p. 377), can be said to have played a part in the proliferation of precarious labor relations, and thus ultimately in the widening of socio-economic inequality.

These findings can be connected to a point raised by Shields (2007), who also argues that the initial promises of the shock therapy, specifically those about the emergence of a sizeable new middle class in Poland, would not be fulfilled. Ultimately, the vast share of wealth would end up concentrated in the hands of a new capitalist bourgeoisie, which favored agents of transnational capital, thus backing Zeniewski’s (2011) argument about the interests of exogenous elites dominating the process and legacy of the shock therapy. What can be concluded is that there exists concrete evidence substantiating the claim that there was deepening socioeconomic inequality in Poland following from the market reforms of 1989 until 2015. The hoop test was thereby passed successfully. The question then turns to whether this rise in inequality influenced voters and actions by the PiS.

Letki, Brzeziński and Jancewicz (2014) found that alongside deepening inequality, there has been a trend towards heightened attention by the population towards this phenomenon. While early studies in the 1990s pointed towards widening inequality potentially being identified as a source of legitimacy of the reforms, later works showed that since the late 1990s, there has been “growing aversion to inequality” (p. 495). On the one hand, the share of people assessing their own household’s financial situation negatively has

noticeably decreased throughout the 1990s and early 2000s. On the other hand, however, the share of people believing that levels of income inequality in Poland are “too large” has risen noticeably and continuously throughout the same timeframe, from below 80% in 1992 to around 91% in 2010. Thereby, it is possible to conclude that throughout the decades following the shock therapy, Polish citizen’s perceptions of inequality did change towards greater concern about its rise.

Importantly, what the authors concluded is that the strongest effects of such heightened awareness and discontent with inequality is on the legitimacy of political institutions, in line with Bruff’s (2014) argument about crises of legitimation of capitalist states. Whereas factors measuring general satisfaction with life and wellbeing have risen, at times significantly, alongside inequality, what has decreased is trust in political institutions following from a “mismatch between politicians’ priorities and the public’s expectations” (Letki, Brzeziński and Jancewicz, 2014, p.511). It was found that “hardly any” policies enacted during or after the 1989 reforms directly address widening inequality, due to commitment to neoliberal policy prescriptions and trickle-down economics claims. This aversion of politicians to tackle growing inequality has subsequently undermined the legitimacy of the government through decreasing trust and lower voter turnout, while conversely resulting in growing discontent and greater expectations about mitigating inequality by voters.

When looking at the PiS response towards these trends, it can be said that the topic of inequality was picked up on by the party (Nimu & Volintiru, 2017). Assessing the party program prior to the 2015 elections, it can be concluded that the PiS was indeed acknowledging discontent with inequality, addressing this in the electoral program via a greater orientation towards unemployment issues, affordable housing, reconstructing the tax system and stronger state direction in the economy. Importantly, these points are all embedded within a wider framework, at whose heart is the direct criticism of the Civic Platform’s (PO) government, also coined the “Tusk system”, which the PiS identified as the central factor for economic and political grievances in the country, enhanced through supposed ties to the judiciary and media. This antagonization thus capitalized on the eroding legitimacy of the government, in part fueled by increased concerns about inequality. Another element contributing to this process is the argued persistence of corruption, which the PiS seeks to address.

The proposed solution by the PiS can be best described as a strategy of comprehensive “elite replacement”. Adapting the general populist framing of “the people”

versus “the elite”, the PiS identified its political opponents as part of a “pseudo-elite”, which is said to be betraying the interests of the nation, in part through subservience to foreign interests. As a solution, political opponents are to be replaced by a “counter-elite”, consisting of PiS-near actors more adept at promoting the national interest and what is right for the Polish people. Importantly, this strategy of elite replacement was aimed at transcending the sphere of political institutions, permeating civil society through the comprehensive establishing of a “new social hierarchy” (Bill, 2022, p.119). These tenets are reflected in the electoral program, with judicial and media reforms being an integral part of the overall “elite replacement” strategy (Nimu & Volintiru, 2017).

Lastly, when assessing election trends in 2015, one finding stands out. Marcinkiewicz (2018) found that a highly significant predictor for voting behavior can be accounted for by the rural-urban divide. Urbanization proved to be a highly statistically significant predictor for higher shares of PO votes and lower shares of PiS votes. Despite the PiS still attaining significant shares of urban votes (30%), this figure stands more than 7% below its overall results, whereas the share of rural voters who elected the PiS stands at 46.8% (Wojtasik, 2016). This trend mirrors Paczynska’s (2005) bifurcation argument and highlights the importance of this cleavage in explaining voting trends.

Ultimately, it can be concluded that widening socioeconomic inequality was both present and relevant leading up to the 2015 election. With previous governments’ avoidance of responding directly to growing inequality, the PiS mobilized growing discontent with this development and channeled it into a larger framework of elite replacement. This mobilization strategy showed results in the 2015 election, with the PiS attracting 10.9% of the previous election’s PO voters (Wojtasik, 2016). While these changes and the PiS election victory generally are accounted for by a wide variety of factors, it can be said that responding to widening inequality was part of the mobilization strategy.

4.2 Austerity

The second dimension of the explanatory variable crises of capitalism is manifested in the persistence of austerity policies. Austerity refers to a variety of measures to reduce government spending in the pursuit of reducing budget deficits. Such measures can take the form of increases in taxation or reducing government spending on various welfare provisions (Fender, 2020). Once again, the starting point is the shock therapy of 1989. Several elements of the reform package overlap with austerity principles, such as introduction of new taxes,

transformations of social welfare programs, and various fiscal consolidation measures aimed at reducing budget deficits. This follows from the fact that the nature of austerity principles coincides to a significant degree with neoliberal prescriptions for decreased government spending (Kolodko, 2000; Kowalik, 2011). It needs to be noted that while certain reform measures display characteristics of austerity, they must be understood in the larger context of the shock therapy, which saw a fundamental restructuring of both the state, the political system, and state-economy relations.

Nevertheless, it is worth reviewing developments in the field of welfare provision in Poland following the reforms. On the one hand, Rutkowski (1998) argued that the welfare state had expanded rather than shrunk following the reforms. On the other hand, however, he conceded that this finding was essentially solely accounted for by a disproportionately large share of government spending on pensions. Most other forms of welfare provisions, such as in the fields of healthcare or education had significantly fallen in real terms because of the transition recession or due to transformations to existing structures. Several elements of previously state-funded social protection were privatized, broken up, or de-centralized in the wake of the market reforms. The only new addition to state-provided welfare were unemployment benefits, as the concept of formal unemployment did not exist during the Communist era (Konat, 2019). However, significant reforms to the unemployment program were undertaken in 1991-1992, just a few years after its inception, disqualifying upwards of a quarter of the previously eligible recipients and significantly cutting down the provided amounts. This in turn fueled homelessness and poverty resulting from the mass unemployment following closures of non-profitable businesses amidst novel competition during the transition recession. “In Poland, the government expenditures as a share of GDP had been declining until 2000, and their level has become stable since then. According to Eurostat, the average in 2005 for the EU countries was 27.8% of GDP and 19.6% for Poland” (Siemieńska, Domaradzka & Matysiak, 2013, p.3).

However, Poland has been found having avoided additional austerity measures initially following the financial crisis of 2007-08. Being credited as the only EU country able to have avoided a recession in the resulting years, the Civic Platform’s (PO) government had increased public spending and did not have to “bail out” its banks and financial sector. In turn though, both the budget deficit and public debt had risen significantly, to which a return to austerity policies was the response (Rae, 2012). Since its re-election in 2011, the PO government had announced its plans to cut spending along several fronts, including limitations on the eligibility for various welfare provisions, such as the termination of internet

subsidies for different creative jobs or tax reliefs for one-child families. Additionally, it proposed several additional measures such as the termination of the special social insurance fund for farmers, further privatization of healthcare and education, and the reversal of a previously enacted pension reform, redirecting funds towards the state budget. Rae (2012) predicted that these actions were “likely to lead to a new economic downturn, an increase in social inequality and poverty, a rise in unemployment and a corresponding upturn in social unrest” (p.23).

Also, Rae’s prediction (2012) highlights the interlinkages between the different dimensions of these crises. Austerity measures, both during the 1990s as well as in the early 2010s had adverse effects on poverty and equality. The “precaritization” in Poland, manifested in the significant rise of temporary and informal working arrangements, can thus be understood as responding to scaling back and insufficient provision of social protection and welfare benefits under neoliberal prescriptions. In 2013, just 16% of unemployed people in Poland were also entitled to unemployment benefits, and those who were, received just 740 zloty, or less than 200€ per month, with an additional reduction to 600 zloty after three months (Konat, 2019). In conjuncture with the significant decrease in labor union density, consequences of austerity policies thus saw the proliferation of precarious working conditions. This finding falls in line with more general arguments put forward by critical GPE scholars like Paul Cammack (2022), who posits that recent tendencies towards greater labor flexibility and precarity signify the persistence of global capital elites in maintaining a continuously exploitable working class.

These findings highlight that austerity measures have in fact been present in Poland, as a part of the initial shock therapy reforms, and notably re-emerging during the tenure of the PO government directly preceding the PiS majority in 2015. Moreover, this rise in austerity prior to 2015 also connects directly to Bruff’s (2014) point about the 2007-08 financial crisis being a focal point for crises of capitalism, and its aftermath lending significant momentum to the rise of authoritarian neoliberalism. Its consequences varied across countries, with most experiencing a recession, while Poland achieved sustained economic growth. However, this initial success was built upon mounting budget deficits and public foreign debt, which in turn resulted in a proliferation of austerity policies a few years after the crisis. This connects the aftermath of the 2007-08 financial crisis to the findings, corroborating Bruff’s (2014) argument about the importance of this event, also passing the second hoop test about the presence of austerity in Poland from 1989-2015.

Rae's (2012) prediction about adverse effects of and social unrest relating to austerity measures would turn out to be largely correct, as the last section highlighted that discontent with the government's avoidance to address inequality grew. The PiS campaign leading up to the 2015 election centered around criticisms of the pension reform reversal by the PO government and promises of universal child welfare benefits, thus mobilizing popular discontent with austerity measures (Nimu & Volintiru, 2017; Beauduin, 2019). The proposed PiS solution to this must be understood within the overarching framework of elite replacement, by which political, judicial and media elites all were to be replaced by PiS-near actors, in the of a promotion of the true "national interest" (Bill, 2022).

Following the election success, the PiS responded towards discontent with austerity in the form of a comprehensive welfare reform, spearheaded by the "Family 500+" program, which provided tax-exempt financial assistance to, initially, families with two or more children, or one-child families below certain income criteria (Lendvai-Bainton & Szelewa, 2021). Additionally, the minimum wage was raised, an affordable housing campaign was promised, and the retirement age was lowered. Judging from these actions it can be said that the PiS was reacting directly and strongly towards discontent with inequality and austerity, thus corroborating the hypothesis. Conversely, increased state intervention and welfare policies clash with the expectation of a reproduction of neoliberalism. However, this is not the end of the story.

Rather than an antithesis to neoliberalism, PiS' strategy can better be understood as a domification of neoliberalism, which synergizes deepening solidarity, though only for "deserving" citizens, with a prioritization of domestic over foreign capital and a general increase of the productivity and greater competitiveness of the domestic economy (Shields, 2021). "State intervention for neoliberalism is thus a strong paternalist state that enables citizens to become effective market agents" (p. 1634). Konat (2019) also argues that through the commodification of welfare in the form of cash benefits, in addition to the fact that people after reproductive age are inherently not included, the strategy is "fundamentally flawed from any kind of socialist perspective". Similarly, Przemyslaw Wielgosz of the Polish edition *Le Monde Diplomatique* disagreed with the notion that the PiS agenda can be classified as a break with neoliberalism (in Jasiewicz, 2017). He argued that while some solidarist elements are present, there exists no re-distribution of wealth, no mechanism for dividing wealth and an absence of taxation of the rich, again pointing to the exclusionist narrative on which the welfare reforms are built.

While re-legitimizing state intervention in the economy, the overall practice of “Family 500+” is characterized by strongly exclusionist undertones, dividing the population into deserving and undeserving of welfare support. “People who do not fit into the homogenic group of white, Polish, heterosexual, Catholic families, preferably married couples with bigger number of children, have been witnessing their rights effectively limited” (Lendvai-Bainton & Szelewa, 2021, p. 569). This pertains not only to the discriminatory nature of welfare provision, but importantly also to public participation, as the general framework of elite replacement sought to suppress dissent through a variety of means, such as the crackdown on NGO activity or the transformation of the media landscape.

The reproduction, rather than challenging of neoliberalism by the PiS welfare reforms is also reflected in the International Monetary Fund praising the reforms for contributing to a 4% boost in private consumption (Shields, 2021). Prime Minister and previous minister of finance and development Mateusz Morawieck argued that Poland should become “one big special economic zone”, thus attracting greater interest from foreign investors and accelerating economic growth (Lendvai-Bainton & Szelewa, 2021, p. 568). The authors concluded that business confidence and the attraction of foreign capital remained central policy goals, thereby not breaking with other core neoliberal tenets despite greater state intervention. This trend reflects elements of Gallo’s (2022) argument about “neoliberalism in one country”.

Thus, it can be concluded that the PiS, in response to growing discontent with austerity, departed from that route through a comprehensive welfare reform. However, the nature of the reforms is complex, linked intricately to exclusive patriarchal nationalistic sentiments, which can be identified as a specific form of welfare chauvinism. The introduction of the welfare reforms has not reflected a move towards greater social protection, but rather a commodification of social relations “aimed at developing a more flexible ‘neoliberal’ citizen” (Shields, 2021, p. 1633). The PiS strategy can be summarized as dividing the population along lines of “deservedness”, rewarding those who adhere to prescriptions of ideal patriotic citizens, in turn seeking to enhance their ability to “become effective market agents”, while refraining from wealth redistribution or a break with the reproduction of capitalist social relations.

4.3 Dislocation

The third dimension of the explanatory variable crises of capitalism concerns dislocation. Special attention hereby needs to be paid to Poland's accession to the European Union and the Schengen Area, as this development dramatically changed migration patterns, resulting in a period of mass emigration. During the 1990s, emigration from Poland remained at relatively stable levels, yet starting in the early 2000s and culminating in the years 2004-2008, Poland would experience significant emigration, whereby the number of Polish emigrants rose from 0.7 million in 2002, to over 2.2 million in 2007 (Statistics Poland, 2020b). Gomulka (2016) identified labor migration as a challenge to the long-term success of the shock therapy, with roughly 10% of the potential labor force having emigrated, in part responding directly to high unemployment in rural areas. With emigration trends also skewing towards younger and well-educated citizens, this outwards migration directly impacted the Polish labor market. Wages for Poles who stayed saw a marginal increase overall, especially those with similar characteristics to emigrants, resulting from a negative labor supply shock in their fields. However, working class citizens with lower levels of education saw no wage gains, even experiencing slight wage decreases at times, due to their demographic being underrepresented among emigrants and thus increasing their relative abundance (Dustman, Frattini & Rosso, 2015). Thereby, it can be concluded that dislocation in the form of mass emigration in the early 2000s had adverse effects on income equality, thus contributing to the already ongoing trends towards deepening inequality and precaritization (Konat, 2019).

A connected finding pertinent to the phenomenon on emigration was made by Czarnacka and Todić (2019), who concluded that "women of a childbearing age tend to disappear from Polish society, a tendency which was especially noticeable when Poland entered the European Union and Polish women were given the possibility of working abroad" (p.11). This phenomenon is linked to the persistence of "hidden austerity" along a gendered dimension, by which women were disproportionately affected by business closures following the shock transformation and subsequent austerity policies, in addition to facing discrimination, institutional tolerance and normalization of domestic violence, and attacks on reproductive rights. The birth rate fell dramatically, from 2.0 in 1990 to just around 1.2 in 2004, fluctuating at roughly 1.3 ever since, indicating that since the shock therapy reforms, Poland's population growth has stagnated, with future trends pointing to significant population shrinkage (Czarnacka & Todić, 2019). Stubbs and Lendvai-Bainton (2020)

pointed out the importance of this “crisis of social reproduction” and identified that the strongly pro-natalist stances and the repatriachalization strategy of the PiS in the form of the Family 500+ program embody a direct response to this crisis. It is understood that anti-LGBTQ sentiments and attacks on women’s reproductive rights are other aspects of this response, also being embedded in the larger goal of creating a new social hierarchy. Heteronormative families with multiple children are being directly rewarded, while significant parts of the population who do not adhere to this prescription are not just excluded from the provision of the welfare program, but oftentimes face severe resistance in the public arena due to various crackdowns on dissenting opinions, such in the spheres of media, NGO activity, or minority rights.

Mateusz Morawieck expressed his desire for emigrated Poles to return, in addition to voicing his expectation and aspiration that emigration flows would slow down in the long run, through the provision of incentives to work and live in Poland by the PiS program (BBC, 2016). Thereby it can be said that the PiS has indeed been responding to dislocation, especially that of increasingly young and well-educated citizens and working aged women, which in turn had led to a crisis of social reproduction. Following the PiS tenure, Polish emigration rates indeed decreased, while already emigrated Poles returned at an increasing rate. The factors for the latter development are multifaceted, including the effects of Brexit and Covid-19. When assessing motivations of citizens who returned, it is possible to conclude that, on the one hand, PiS policies like Family 500+ did play a part in their choice, providing a material incentive for families to live in Poland, while on the other hand, returnees experienced a “culture shock”, arguing they only considered returning to multinational urban environments, rather than more their more rural home towns (Johnson, 2023; Shotter, 2019). Another important factor incentivizing the return of emigrants concerns the availability of novel job prospects that did not exist before. These opportunities are in turn linked to an influx of multinational corporations setting up branches in Poland, incentivized by the government through various policies, such as the expansion of the existing framework on special economic zones and the introduction of tax incentives to attract foreign investors (Polish Investment and Trade Agency, 2018). This in turn points to the persistent importance of foreign capital and transnational capital elites for the overall strategy of the PiS, indicating that despite the welfare reforms, commitment to neoliberal tenets is still of great importance. It can thus be concluded that the hoop test for the presence of dislocation in Poland in the form of mass emigration in the early 2000s can indeed be

passed, and the findings additionally confirm that the PiS and their policies have been responding to this phenomenon.

5.1 Summary of observations

Therefore, it can be noted that all three hoop tests are passed, with the findings additionally showing the different dimensions of the explanatory variable “crises of capitalism” having direct and indirect effects on voter and party behavior. These crises thus explain growing voter dissatisfaction on the one hand, thereby providing an explanatory framework for the proliferation of populism, while on the other hand explaining how these crises impacted the PiS towards their pursuit of autocratization. The analysis showed that there was a growing dissatisfaction with widening inequality and the persistence of austerity policies prior to the 2015 election. Adverse long-term effects of the shock therapy reforms were manifested in persistently growing income and wealth disparities, high unemployment especially in rural areas, and mass emigration following in part from this phenomenon. There was a visible rise in discontent with the government’s avoidance to address such crises leading up to 2015, manifested in the growing share of citizens concerned about inequality, notably despite growing overall satisfaction with one’s own financial situation, thus highlighting the importance of inequality specifically.

The PiS subsequently capitalized on this erosion of legitimacy of the incumbent government, additionally fueling this process. As can be concluded from the party’s electoral program leading up to the 2015 elections, the adverse effects of these crises, alongside other grievances, are claimed to be the direct fault of political opponents like the PO, framed as the “pseudo-elite”, who are said to have foregone or even betrayed the interests of the Polish nation. Dissatisfaction with inequality, austerity and dislocation was effectively mobilized by the PiS, embodying important parts of their electoral program, and being manifested in the significant share of 2011 PO voters having switched to the PiS in 2015. As a necessary response, a comprehensive strategy of elite replacement is presented, whereby not just political representatives are to be overhauled, but a new social hierarchy needs to be established, whereby judicial and media reforms are legitimized based on being in the best interest of the nation. From this is it possible to conclude that the illiberal reforms enacted by the PiS are indeed responding directly to crises of capitalism, said to be caused by political opponents, which in turn provides an answer to the Research Question: “Autocratization proliferated because of crises of capitalism and interconnected crises of legitimization by the

previous government, with the illiberal reforms directly responding to these crises and framing them as a necessary move to protect the interest of the nation.”

Within the PiS response, there was a departure from austerity policies in the form of a comprehensive welfare reforms, yet this move needs to be understood in the larger context of the establishing of a new social hierarchy, whereby heteronormative families with multiple children are explicitly rewarded and vast parts of the population are excluded. Incentivizing childbirth can in turn be understood as a response towards a crisis of social reproduction, resulting in part from the mass emigration of the early 2000s. Importantly however, this highly exclusionist form of state intervention does not imply a break with other core neoliberal tenets. Absence of redistributive policies, a maintained emphasis on the attraction of foreign capital, the commodification of welfare provision, and the willful reproduction of capitalist social relations all points to the persistence of the neoliberal capitalist ideology, despite the interventions. Rather than implying a break with neoliberalism, it can be concluded that the PiS strategy embodies a domestication of neoliberalism. The provision of the novel welfare program is divided along lines of deservingness, enabling those being deemed deserving to become effective market agents, while simultaneously suppressing large shares of those not conforming to the prescriptions of ideal, patriotic citizens through various means such as restrictions on LGBTQ-rights, women’s reproductive freedom, NGO activity and more.

5.2 Conclusion

Following from these findings, it is possible to corroborate the hypothesis postulated by Ian Bruff’s (2014) theory of authoritarian neoliberalism, namely that post-2008 instances of autocratization embody a response to crises of capitalism. However, it needs to be noted that the analysis only sought to corroborate for the presence of a contributing condition, which points to an important limitation of this research. While it can be noted that the theory of authoritarian neoliberalism provides a solid explanatory framework for understanding democratic backsliding in Poland, it is not the argument of this paper that crises of capitalism are the only possible explanatory factor for this development. Of the existing theories discussed in chapter 3.1, both the invocation of nationalist in-group sentiments and the mobilization of religion can be appropriately integrated within the overall framework of the creation of a new social hierarchy.

Important other aspects, such as strong anti-refugee and related anti-EU mobilization in the 2015 election, in addition to criticism of the EU based on a supposed imposition of a “gender ideology”, clashing with traditional Polish values, unfortunately came up short in this contribution. While some connections can be drawn to the framework provided by authoritarian neoliberalism, it would be incorrect to classify these phenomena as crises of capitalism. Yet they were nevertheless important factors in the election, with the PiS claiming that the EU was at fault for a “cultural and social crisis”, which also provided a background and justification for the radical nationalistic repatriachalization strategy, which in turn legitimized illiberal reforms (Nimu & Volintiru, 2017). Thereby it is possible to say that the explanatory variable of authoritarian neoliberalism provides a strong contributing condition towards the proliferation of autocratization, yet it is not a singular cause. Democratic backsliding is a fundamentally complex phenomenon, and it is doubtful whether one single cause could ever account for the entirety of the explanation. Recommendations for future research can thus be issued towards the exploration of the interplay between authoritarian neoliberalism and such additional causes.

Lastly, it may be noted that the effects and aftermaths of the various reforms are very much still ongoing. Just this week, on the 5.6. 2023, the European Court of Justice issued a ruling which concluded that the Polish judicial reforms are in direct violation of EU law, siding with the Commission’s prior condemnation. Government officials have heavily criticized the decision, thus potentially heightening tensions between Brussels and Warsaw. Only a day prior, the Polish capital experienced a new mass protest, consisting of hundreds of thousands taking to the streets to voice their opposition towards PiS and their controversial reforms (BBC, 2023). So far, the party resisted a change of course despite domestic and foreign criticism, yet mounting pressures could potentially lead to new developments in the ongoing and contentious reign of the PiS.

6. Bibliography

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