

IMPACT OF THE COVID-19 PANDEMIC ON THE ARCHITECTURE OF THE WELFARE STATE

The influence of the Covid-19 pandemic on the institution of the welfare state and its prospects is examined. The changes in the architecture of the welfare state that occurred under the influence of the pandemic are analysed. It is clarified how changes in social policy during the pandemic affected the overall stability of the welfare state. The pandemic is characterized as one of the critical moments in the evolution of the welfare state due to its inflexibility, and inability to quickly adapt to new social challenges. Most of the current models of welfare states, as expensive and cumbersome systems, are proved to be poorly adapted to the scale of the challenge posed by the pandemic.

Keywords: welfare state, pandemic, SARS-CoV-2 (Covid-19) virus, crisis of the welfare state, modernization of the welfare state, models of the welfare state, social protection, social security.

Хома Н. М. Вплив пандемії Covid-19 на архітектуру соціальної держави

Досліджено вплив пандемії Covid-19 на інститут соціальної держави та його перспективи. Проаналізовано зміни у архітектурі соціальної держави, які відбулися під впливом пандемії. З'ясовано, як зміни соціальної політики періоду пандемії вплинули на загальну стійкість соціальної держави. Пандемію охарактеризовано як один з критичних моментів еволюції соціальної держави через негнучкість останньої, нездатність швидко адаптуватися до нових соціальних викликів. Доведено, що більшість нинішніх моделей соціальних держав, як дорогих та громіздких систем, виявилися погано адаптованими до такого масштабу виклику, яким стала пандемія.

Ключові слова: соціальна держава, пандемія, вірус SARS-CoV-2 (Covid-19), криза соціальної держави, модернізація соціальної держави, моделі соціальної держави, соціальний захист, соціальне забезпечення.

Introduction. The welfare state is now at the stage of a protracted crisis, which has been growing for over half a century (since the 1970s). This political and legal institution is facing more and more

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challenges. They are caused by both the strengthening of international interdependence and the increasing severity of global problems of humanity as well as a wide range of reasons at the national level (security, environmental, demographic, economic, etc.).

One of the recent factors that affected the sustainability of the welfare state institution was the SARS-CoV-2 (COVID-19) virus pandemic. The pandemic became “a critical juncture in the development of the welfare state affirming its importance for its citizens’ economic, health and wellbeing, and safety, especially for its most vulnerable populations” [1]. However, most of the current models of welfare states, as expensive and cumbersome systems, turned out to be poorly adapted to an unexpected challenge of such a scale. Thus, the need to build more capable models of the welfare state has once again become actualized. The task of modernising the political and legal design of the welfare state and correcting the trajectory of its development in the conditions of upward dynamics of various challenges and risks remains.

The relevance of the topic of changing the institution of the welfare state under the influence of the coronavirus pandemic is due to the need to assess the changes that occurred with the institution of the welfare state in response to the pandemic, as well as its ability to react to crisis situations of a global scale. In the situation of increasing risks and challenges, it is necessary to find out which model of the institution of the welfare state is the most viable. The purpose of the study is to determine the impact of the COVID-19 pandemic on the social state and the prospects of this institute. The objectives are to analyse the changes in the architecture of the welfare state under the influence of the pandemic; and to find out how the changes in social policy during the pandemic affected the overall sustainability of the institution of the welfare state and its prospects.

State of problem development and research methods. The pandemic of the coronavirus disease lasted for a year and a half, and as of May 4, 2023, according to the decision of the WHO, it is considered over on a global scale. Although various risks to the life and health of the population remain, the general stabilization of the situation allowed researchers to move on to assessing the impact of this emergency on various aspects of the life of society and the state. In particular, the issue of assessing the role of the welfare state during the pandemic, its ability to respond to challenges of such a scale, to take into account the

lessons of such a global problem, and to adapt to an increasing number of challenges and risks has become relevant.

Domestic political scholars (S. Oliinyk [2; 3], T. Khlivniuk [4; 5; 6], etc.) initiated a discussion of the influence of the pandemic on the institution of the welfare state in the national scientific discourse. However, the works of the mentioned researchers concerned the impact of the pandemic on the functioning of the welfare state during the acute phase of COVID-19. Instead, the post-pandemic “diagnostics” of the institution of the welfare state has hardly been carried out. The national political and legal discourse has not assessed how the coronavirus pandemic changed/is changing the institution of the welfare state. It is not clarified to what extent innovations in the field of social policy have become sustainable or whether they have become only situational reactions of the state to an acute crisis. Instead, more attention has already been paid to this issue by foreign scholars (R. Bejan, D. L. Carlson, E. Csudai, B. Ebbinghaus, Y.W. Ku, L. Lehner, K. H. Mok, E. Naumann, K. Nikolova, C. Noble, G. Ottmann, J. R. Pepin, R. J. Petts, S. Saxonberg, T. Sirovátká, T. K. Yuda, and others). Our analysis of the historiography of the study has showed that the topic of changing the configuration of modern models of the social state under the influence of various factors is now increasingly coming into the focus of researchers’ attention. This demonstrates its urgency, the social demand for the results of such scientific investigations and the need to deepen them.

The methodology for studying the influence of the coronavirus pandemic on the institution of the welfare state combines neo-institutionalism and comparative analysis. Neo-institutionalism made it possible to reveal the changes occurring within the institution of the welfare state under the influence of certain factors. The comparative analysis made it possible to find out whether different models of the welfare state are being modernized given the likelihood of new global challenges, such as the SARS-CoV-2 (COVID-19) virus.

Presentation of the main material. The scale of the coronavirus infection created a huge burden on the infrastructure of welfare states. This situation affected all classical models of the welfare state (liberal, continental European (conservative), social democratic – according to G. Esping-Andersen’s classification). The coronavirus pandemic intensified the feelings of vulnerability and uncertainty in communities, even in states with relatively stable institutions of the welfare state

and a reliable system of social guarantees. Social inequality due to the pandemic rapidly exacerbated social polarization and a high degree of social deprivation of people in most countries, and as a result, erosion of trust in governments and growth of protest sentiments. This created additional reputational risks for the institution of the welfare state. Therefore, after the beginning of the pandemic, “countries worldwide responded with an unprecedented introduction of new and expansion of existing social protection policies, both aiming at mitigating the actual health crisis and alleviating the social and economic hardships induced by the containment measures, including lockdowns” [7].

The coronavirus pandemic became an example of how various crises disproportionately affect the most vulnerable segments of the population [8]. Traditionally, they are the first to be addressed by the welfare state. Low-income categories of the population most felt the consequences of COVID-19 on health and income levels due to the inability to stay in self-isolation for a long time, work remotely, get vaccinated as quickly as possible, etc. This made the role of the institution of the welfare state significant above all for vulnerable categories of the population. The COVID crisis exacerbated, first of all, inequalities in the labour market, and the closure of educational institutions and requirements to work from home made it difficult to combine work and family life [9]. Thus, the social impact of the pandemic was also felt by those who had sufficiently stable social positions and therefore needed social protection.

This pandemic did not only pose a challenge to the national institutions of the welfare state in most countries but also exacerbated long-standing tensions in welfare policy. It is about coordinating the preservation of established social benefits with the adaptation of social policy to new risks. There was another surge of discussions about whether the welfare state was able to effectively and efficiently prevent and minimize the decline in life chances for most social groups under crisis circumstances. Such a problem became acute due to at least two characteristics of the institution of the welfare state: 1) at the time of the pandemic in most countries, this institution had already been in crisis for a long time and demonstrated insufficient resistance to new challenges each time; 2) it is very difficult to adapt to each new social challenge, it is not flexible.

“The COVID-19 pandemic disrupted many features of development with domino effects in the social sphere” [10, p. 2039]. Fiscal policy was revised, health care funding was increased, targeted support was provided to vulnerable households, utilities were subsidized, loan payments were postponed, new types of labour relations were normalized, etc. So, new types of payments, new social services, new benefits, etc. were added. But at the same time, the economies of most countries were faced with the challenge of large-scale reforming of the social sphere, because economic growth in most countries stopped or significantly slowed down during the pandemic*. The possibilities to increase the financing of the social sphere were limited even in states with a sufficiently stable institution of the welfare state (such as in the Nordic states with a social democratic model). The global recession due to the risks of mass infection with the coronavirus has become one of the deepest in recent decades. The overall decrease in economic activity immediately affected budget revenues and the ability of the welfare state institution to finance social projects. Meanwhile spending on the social sphere, on the contrary, required an urgent increase.

During the pandemic, governments more or less effectively adapted their social policy to the current situation, introduced emergency changes in legislation. This was caused by the growth of unemployment, the insecurity of self-employed workers, the growing risks of infection and isolation, etc. [11, p. 94]. But in most welfare states, the distinct consequences of quarantine restrictions for different professional groups were poorly taken into account during the response to the pandemic.

Within European (and not only) welfare states, the coronavirus crisis once again highlighted the shortcomings of the current models of the welfare state. During the pandemic, the classic models of the welfare state were put to the test, which called into question their social and economic sustainability. The pandemic demonstrated “how increasingly threadbare social safety nets and precarious labour markets have left many marginalised and even destitute” [12].

* The case of Sweden, which did not introduce strict quarantine restrictions, is rather an exception. Even with such an approach to the pandemic, it was not possible to avoid a drop in GDP under the conditions of close integration of the Swedish economy into the world economy. This drop was smaller than in other states, but it affected the budget.

At the height of the pandemic, it was not clear whether the innovations being implemented would only be a temporary response to that crisis (such as one-time benefits) or whether long-term transformational changes to the institution of the welfare state would occur. There was a high probability that “governments will return to neo-liberal orthodoxy, abandon temporary measures implemented during the pandemic and introduce austerity measures to decrease the budget deficits once the pandemic recedes” [13, p. 94].

Therefore, the trajectory of the development of the social state institution as a whole, and its main models in particular, was not clear. At the same time, the expectation that the pandemic could stimulate the renewal and strengthening of the welfare state increased. The pandemic was positioned as a potential turning point for the renewal of the welfare state [14, p. 307]. It was primarily about the need to construct such a model of a social state that would become a state of social investments. This is because classic models of the welfare state still prioritize support for those who are below the poverty line or in other difficult conditions. But this model of the social state does not correspond to the contemporary realities. Its persistent conservatism and over-bureaucratization currently do not contribute to its ability to quickly adapt to new realities.

The need to reform the institution of the welfare state is well understood at the highest level of states and their unions. For example, according to the assessment of the European Commissioner for Jobs and Social Rights N. Schmit: “The COVID-19 pandemic has revealed how important effective social protection and welfare systems are in order to cushion the economic and social blow of any crisis. Now, we must work on making the welfare state fit for the future” [15].

Today there is a very vague idea of what requirements the idealized model of the welfare state, which is the most relevant to the realities of the time, must meet. Obviously, the priority is readiness for crisis situations and the ability to react quickly. It is noticeable that developed welfare states have intensified reforms aimed at strengthening their preparedness for emergencies in recent years. Here we are talking not only about possible pandemics (conditional diseases X) but also about other problems. Security and climate challenges are now among the most evident ones that are in the focus of attention of modern states.

Another thing is that the initiated reforms are not always consistently implemented in practice and do not become an effective response.

No less problematic is the fact that populists often speculate on the future of the welfare state in order to come to power or after winning the elections. Populist radical right parties, for example in Western Europe, “have almost without exception shifted their position on distributive issues, abandoning their earlier support for a minimal welfare state in favor of higher social spending” [16, p. 383; 17].

It is worth noting that the consequences of the pandemic were strongly influenced by which classical model of the welfare state functioned in a particular country. For example, welfare states of the social-democratic type (Sweden, Norway, Denmark, Finland, Iceland and the Netherlands) had a comparatively lower mortality rate from Covid-19. The states in question are strong welfare democracies, “with universalist models of healthcare provision, extensive state transfers, redistributive welfare policies, and generous public services and benefit plans that have all been deemed essential for population health, particularly through the reduction of mortality” [18, p. 712].

The need for changing welfare regimes is evident. These “changes cannot be considered in isolation from the economic structure and its background” [19]. “New structures in the relationship between the three major dimensions of welfare provision triangles, namely state, market, and society” [20] should be rethought and created. This is facilitated by the digitalisation of service delivery processes [21; 22], which occurs rapidly in most countries during and after the pandemic.

Numerous changes have already occurred during the pandemic. The innovations differed significantly between welfare state models. Thus, during the pandemic, states with a social-democratic (Scandinavian) welfare state model mostly only expanded their existing universalist and generous social security measures, but practically did not introduce new ones [23]. Instead, states with liberal models of the welfare state had to implement new tools of social policy [24; 25]. States with the continental European model introduced new mechanisms to protect people who were involved in non-standard forms of labour relations, such as freelancers [26; 27].

Consequently, during the pandemic, governments initiated a more or less wide range of initiatives to support citizens. However, as soon as the pandemic subsided, the programs began to close or were generally a one-

time form of support. That is, many social protection innovations were situational. For example, measures introduced by many states during the pandemic “have not fundamentally improved formal access to social protection schemes for non-standard workers and the self-employed. Especially in the domain of unemployment benefits, temporary (sometimes one-off), mostly flat-rate and means-tested benefits have been introduced for these categories, thus falling short in structurally addressing important gaps in their social protection systems, which pre-date the Covid-19 pandemic” [28]. The pandemic caused intense debate, some changes in the social protection of persons who perform work on an irregular basis, as well as the self-employed, strengthened the awareness of the need to eliminate gaps in their protection, but these issues are still not properly regulated in many states.

Any crisis has the potential to open a “window of opportunity” for reforming political and legal institutions. Nonetheless, G. Esping-Andersen, the founder of the social state theory, emphasized that welfare regimes are considered to be extremely stable [29]. The welfare state is a complex and rather conservative institution that is difficult and slow to change. However, contemporary states are already facing a complex of challenges today, which, in addition to pandemics, include the growth of armed conflicts, destructive climate changes, large-scale migration flows, etc. New crises are inevitable and this requires the preparation of social protection systems. There should be a transition from focus on mitigating present-day problems to strengthening society’s resilience to various risks. At the same time, not only vulnerable groups should be the focus of attention of the welfare state.

The strengthening of resistance to new challenges should become the new goal of the welfare state. Minimization of various risks should be the task of the welfare state. In particular, this can be achieved through the development of human capital. In modernized social states, there must be a transition from reducing the risk of poverty to a policy of reducing the vulnerability of certain social groups, increasing the ability to cope with certain challenges and quickly adapt to them (maximizing resistance to challenges). A modernized welfare state must not only be ready to respond *ex post facto* to any social challenge but also be ready to act in advance, before any crisis situation has a destructive social effect. Acting in advance – this could be the message of social states adapted to the challenges of today.

Conclusions

The period of the coronavirus pandemic became one of the most critical moments in the evolution of the institution of the welfare state. On the one hand, all its significance for the protection of health and well-being of the population, and the functioning of states as a whole was manifested. On the other hand, the pandemic demonstrated how difficult it was for the institution of the welfare state to adapt to new social challenges, to become flexible to new realities. During the pandemic, classical models of the welfare state were tested for efficiency, flexibility, and responsiveness. Initiatives aimed at supporting social unity and organizing people's daily activities under quarantine restrictions were expected from the welfare state during the pandemic.

However, in practice, in many countries, the institution of the welfare state failed to respond to such a social demand. Fragile social safety nets and unstable labour markets left many people marginalized, and many of the effects of the pandemic persisted long after it ended. Most of the contemporary models of welfare states, as expensive and cumbersome systems, turned out to be poorly adapted to an unexpected challenge of this magnitude. Persistent conservatism and bureaucratization did not contribute to the rapid adaptation of various models of the welfare state to the conditions of the pandemic. The present situation in its global dimension is characterized by the suddenness of new challenges, and it is clear that the institution of the welfare state is nowadays poorly prepared for them.

Since the beginning of the pandemic, most welfare states implemented unprecedented new social policy measures that expanded the social protection system. These measures were aimed at mitigating both the health crisis and the social and economic hardships caused by the lockdown. Yet, most of the introduced or expanded social protection policies were one-time or temporary [30]. In most states, there was no subsequent reset of national social policies, which would strengthen readiness for challenges of the same scale as the coronavirus pandemic in the future.

At present, it is impossible to conclude that there has been a renaissance of the welfare state as a crisis management tool. The political and legal design of the social state needs to be modernized, and the trajectory of its development needs to be corrected under the conditions of the upward dynamics of various challenges and risks. The

spectrum of these challenges is constantly changing, and the coronavirus pandemic will not be the last and, perhaps, not the most difficult. This is also important given the security challenges of recent years, under the influence of which many states are increasing funding not for the social sphere, but for the sphere of security and defence.

Nowadays, it is more correct to ask the question not whether the institution of the social state will be preserved in the future, but in what way it will develop further, and what characteristics it will acquire in order to meet modern challenges. In our opinion, such a model of the social state, which will ensure equal autonomy for everyone in achieving their life goals in solidarity with others, will have a perspective. The welfare state must get rid of its conservative sluggishness, become more flexible, and acquire the skills of quick response to specific situations. Digital transformation of the welfare state's functioning is intended to help achieve this. New structures must be rethought and created in the relationship between the three main dimensions of the social security triangle, namely the state, the market and society.

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Хома Н. М. Вплив пандемії Covid-19 на архітектуру соціальної держави

Досліджено вплив пандемії Covid-19 на інститут соціальної держави та його перспективи. Проаналізовано зміни у архітектурі соціальної держави, які відбулися під впливом пандемії. З'ясовано, як зміни соціальної політики періоду пандемії вплинули на загальну стійкість соціальної держави.

Пандемію схарактеризовано як один з критичних моментів еволюції соціальної держави через її негнучкість, нездатність швидко адаптуватися до нових соціальних викликів. Доведено, що більшість нинішніх моделей соціальних держав, як дорогих та громіздких систем, виявилися погано адаптованими до такого масштабу виклику, яким стала пандемія.

Авторка відзначила, що після початку пандемії більшість соціальних держав впровадили нові безпрецедентні заходи соціальної політики, які розширили систему соціального захисту, але більшість запроваджених або розширених політик соціального захисту були одноразовими чи тимчасовими. У більшості держав надалі не відбулося перезавантаження національних соціальних політик, що дозволило б посилити готовність до масштабних соціальних викликів у майбутньому. Підкреслено, що наразі не можна зробити висновок про ренесанс соціальної держави як інструмента врегулювання криз. Відзначена потреба осучаснення політико-правового дизайну соціальної держави.

Зауважено доцільність постановки питання не про те, чи збережеться в майбутньому інститут соціальної держави, а яким шляхом цей інститут розвиватиметься, яких характеристик має набути для відповідності сучасним викликам. Перспективу, за оцінкою авторки статті, матиме така модель соціальної держави, яка забезпечуватиме рівну автономію для всіх у досягненні своїх життєвих цілей у солідарності з іншими. Соціальна держава має позбутися своєї консервативної неквапливості та набути гнучкості. Цьому спрямована допомоги цифрова трансформація процесів функціонування соціальної держави, а також перегляд відносин у трикутнику «держава – ринок – суспільство».

Ключові слова: соціальна держава, пандемія, вірус SARS-CoV-2 (Covid-19), криза соціальної держави, модернізація соціальної держави, моделі соціальної держави, соціальний захист, соціальне забезпечення.