



Socioekonomické a humanitní studie
Socio-Economic and Humanities Studies

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Green Public Procurement in Slovakia: Public Policy vs Reality

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EDITORIAL

Vážené čtenářky, vážení čtenáři,

aktuální číslo časopisu *Socio-Economic and Humanities Studies* přináší soubor studií, které se z různých perspektiv věnují otázkám sociální participace, fungování veřejných politik, kulturního zapojení a vnitřní bezpečnosti.

Dvě publikované studie se zaměřují na hudbu a kulturu jako nástroje sociální inkluze. Výzkum realizovaný v prostředí pobytové péče o děti ukazuje, že dlouhodobá kolektivní hudební činnost může významně přispět k rozvoji sociálních dovedností, sebedůvěry a pocitu sounáležitosti. Analýza genderových aspektů potenciální účasti na koncertech klasické hudby zároveň poukazuje na to, jak hodnotové orientace a genderové role ovlivňují kulturní participaci v českém kontextu.

Další příspěvek se věnuje zelenému veřejnému obstarávání na Slovensku a upozorňuje na rozdíl mezi deklarovanými cíli veřejné politiky a jejich omezenou realizací v praxi, zejména v důsledku administrativních a kontrolních mechanismů.

Společným jmenovatelem všech příspěvků je důraz na roli institucí, kulturních rámčů a odborného poznání při utváření možností participace, rovnosti a bezpečnosti v současné společnosti.

S pozdravem
Mgr. Milan Křápek, Ph.D.
šéfredaktor

Dear Readers,

the latest issue of the Socio-Economic and Humanities Studies offers a collection of studies that explore the issues of social participation, public finances, cultural participation and internal security from different perspectives.

Two of the published articles focus on music and culture as a tool for social inclusion. Research conducted among children in residential childcare shows that long-term collective musical activities may substantially contribute to the development of social competencies, confidence and a sense of belonging. An analysis of gender aspects of potential participation in classical music concerts draws attention to how values and gender roles affect cultural participation in the Czech context.

Another study investigates green public procurement in Slovakia, highlighting the differences between the declared public policy objectives and their limited implementation in real life caused, in particular, by administrative and control mechanisms.

All texts share an accent on the role of institutions, cultural frameworks and expert knowledge in the creation of opportunities for participation, equality and security in the current society.

Yours sincerely,
Mgr. Milan Křápek, Ph.D.
Editor-in-Chief

GENDER AND POTENTIAL PARTICIPATION IN CLASSICAL MUSIC CONCERTS: A MIXED-METHODS ANALYSIS¹

MARIE VÍTOVÁ DUŠKOVÁ

JAN KOUDELKA

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DAGMAR PETRŮ

ABSTRACT

This article explores how gender shapes potential participation in classical music concerts in the Czech Republic. Drawing on secondary analysis of the MML-TGI 2021 dataset (N = 15,070) and a segmentation of individuals who express interest in classical music but have not attended a concert in the past year (PCMC, approx. one quarter of the Czech population), the study describes five audience segments with distinct cultural practices and values. Overall, the PCMC group demonstrates more egalitarian views on gender roles than the general population – expressing stronger support for equal sharing of household responsibilities and lower endorsement of male dominance in family decision-making. However, substantial variation emerges across segments: Culturally Engaged Supporters and Musicians exhibit progressive attitudes and higher openness to new cultural formats, while the Reserved align more closely with traditional gender role models; Emotional Cultural Traditionalists and Anti-Consumerist Art Lovers occupy ambivalent positions. These findings resonate with international literature on women's predominance in highbrow culture participation and on structural gender inequalities in cultural supply. The study contributes the first systematic evidence on gendered dimensions of potential classical music audiences in the Czech context and suggests practical implications for cultural institutions.

Keywords: classical music audiences, gender roles, cultural participation, audience segmentation

JEL Classification: Z10, Z11, J16

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INTRODUCTION

Audience participation in classical music concerts has long been a subject of interest for both cultural institutions and researchers. Data from various countries show that although a significant proportion of the population appreciates classical music and even lists it among their preferred genres, actual concert attendance remains relatively low and has often stagnated or declined in recent decades (Dobson & Pitts, 2011; Pitts, 2005). From the perspective of cultural institutions and researchers, this paradox between declared appreciation and actual participation has given rise to extensive discussions about barriers to entry into the live classical music market. Among the most frequently cited obstacles are perceptions of the concert environment as exclusive, fears of lacking familiarity with established concert conventions and the absence of the cultural capital required to navigate this setting (Pitts et al., 2013; Tröndle et al., 2025).

One factor that is often overlooked in scholarly literature is gender. Yet gender may play a crucial role in shaping who participates in cultural activities, with what motivations and with what kinds of experiences. Research shows that women constitute the majority of classical music audiences (e.g., DiMaggio, 2004; Bihagen & Katz-Gerro, 2000; Christin, 2012; Vítová Dušková, 2022), while at the same time facing different barriers to participation than men – for example, the ways in which their roles within cultural spaces are perceived and legitimized (Dearn & Pitts, 2017; Ramstedt, 2023). Gender thus represents a neglected but vital dimension that can offer deeper insight into the uneven distribution of cultural participation.

Theoretical frameworks for studies of cultural participation are often grounded in Pierre Bourdieu's concepts of cultural capital, habitus and field (Bourdieu, 1984). These notions highlight that preferences and the ability to orient oneself within the realm of "high" culture are not simply a matter of individual choice, but rather socially conditioned processes. Feminist scholars, however, have pointed out that Bourdieu's theory implicitly assumes a male subject and insufficiently addresses the gendered dimensions of cultural reproduction (McCall, 1992; Moi, 1991). Beverly Skeggs (1997) demonstrated that cultural capital is always gendered: for example, working-class women acquired cultural resources in different ways than men, and

their practices were judged through the prism of “respectability”. Adkins and Skeggs (2004) therefore emphasize that cultural capital should be understood as structured not only by class but also by gender. This is crucial because gender norms shape not only access to cultural resources, but also the legitimacy attributed to different forms of cultural participation. This has direct implications for musical audiences, as concert institutions themselves may carry implicit gender symbolism – for instance, in the image of the conductor as an authority figure or in the framing of female audiences as “emotional” (Cusick, 1999).

Over the past two decades, a number of empirical studies have advanced knowledge about the motivations, barriers and experiences of classical music audiences. Dobson and Pitts (2011) described how new attendees often encounter social norms and conventions that function as exclusionary filters. Pitts (2005) highlighted the importance of a sense of inclusion in determining whether individuals feel part of a cultural community. Studies on orchestras and their audiences (Pitts et al., 2013) have provided insights into listener motivations and their relationship to performance practice. Tröndle et al. (2025) analyzed audience typologies and their differing values and expectations. Vitová (2022) examined the influence of musical preferences on concert attendance. Dearn and Pitts (2017) explored how young listeners interpret the classical concert in the light of their experiences with popular music, showing gender as a salient factor. Ramstedt (2023) offered a qualitative exploration of the experiences of professional female musicians, revealing how gender norms shape not only their careers but also the ways in which they are perceived by audiences.

Despite these contributions, direct empirical investigation of gender aspects of classical music audiences remains limited. Some studies focus on gender inequalities within musical institutions (Scharff, 2017) or on the underrepresentation of women in repertoire and among composers (Borowiecki et al., 2025), but the question of how gender attitudes and values are reflected within audiences themselves has so far received only marginal attention. In the Czech context, systematic research into the gender dimensions of classical music audiences is virtually absent.

This article seeks to address this research gap. Drawing on secondary analysis of extensive MML-TGI data and on a segmentation study of the potential classical music audience in the Czech Republic, we analyze the gender characteristics

and attitudes of this group. The aim is both to provide a detailed profile of the potential audience from a gender perspective and to demonstrate how gendered perspectives intersect with cultural segments. The results are relevant not only to theoretical debates on cultural participation and gender, but also to practical applications in music management and audience development.

1 METHODS

1.1 DATA AND DEFINITION OF THE TARGET GROUP

The analysis is based on secondary data from the continuous MML-TGI 2021 research project in the Czech Republic ($N = 15.070$). MML-TGI research project (Median) is a continuous, quarterly conducted marketing and media survey representative of the Czech population aged 12–79. The dataset includes detailed information on media consumption, lifestyle, values and attitudes, including a standardized battery of statements on gender roles.

Data were processed in the DataAnalyzer software environment using weighted projections to the population aged 12–79.

The target group was defined as “potential classical music concertgoers” (PCMC), i.e., respondents who reported classical music among their preferred genres but had not attended a classical music concert or festival in the previous 12 months. This group comprises approximately 1.94 million individuals (sample size $N = 3.610$), representing about one quarter of the Czech population within the observed age range.

1.2 SEGMENTATION ANALYSIS OF PCMC

Variable selection and data preparation

For the segmentation of PCMC, a set of statements concerning cultural and value orientations, lifestyle and interests was used. Responses were measured on five-point Likert-type agreement scales and subsequently standardized (higher values = stronger agreement). Items with low variability or high proportions of missing values were excluded from the analysis.

Factor analysis

To reduce the number of variables and uncover latent structures, a principal com-

ponent analysis (PCA) with Varimax rotation was conducted. The criterion for retention was an eigenvalue greater than 1; only loadings ≥ 0.30 were considered. The analysis yielded seven factors (e.g., *art, spirituality and tradition, creativity, literature and formality, musical inclinations, anti-consumerism and passivity, emotions*), which together explained approximately 58% of the total variance.

Cluster analysis

Based on factor scores, a k-means cluster analysis was performed. Solutions with 4–6 clusters were tested; a five-cluster solution proved the most suitable, providing the clearest interpretability and balanced group sizes. The resulting segments were labelled according to their dominant characteristics: *Reserved, Musicians, Emotional Cultural Traditionalists, Culturally Engaged Supporters, and Anti-consumerist Art Lovers*.

Validation and supplementary analyses

The stability of the segments was tested using contingency analyses (χ^2 tests) and correspondence analysis, which confirmed significant differences between clusters in key statements. In addition, the MCART method (classification and regression trees) was employed to predict segment membership based on sociodemographic indicators (age, education, size of place of residence, socioeconomic class). To enrich segment profiles, supplementary contingency analyses were carried out using a broader set of variables (cultural consumption, media behaviour, expenditures, interests).

1.3 ANALYSIS OF GENDER ATTITUDES

Comparison of PCMC and the general population

In the next step, the PCMC group was compared with the general population in relation to attitudes toward gender roles. A set of statements reflecting both traditional and modern conceptions of gender roles was used (e.g., “*A woman should always prioritize family over career*”, “*Men and women should share responsibility for the household equally*”). Differences were tested using χ^2 tests of independence and expressed through indices (100 = population average).

Dimensions of gender attitudes within PCMC

To gain deeper insight into the structure of gender attitudes, a factor analysis (PCA, Varimax rotation) was conducted within the PCMC group. The analysis

yielded three factors: Traditional roles (statements emphasizing conventional division of labour and male authority), Equality (statements stressing balanced involvement of both genders) and Freedom (statements highlighting individual liberty and flexibility in gender roles). These three factors together explained approximately 47% of the variance.

Gender attitudes across segments

The linkage between gender attitudes and PCMC segments was examined by comparing mean factor scores across segments, complemented by contingency analyses for selected statements. This approach made it possible to identify which segments tended to align more with traditional conceptions of gender roles (e.g., *Reserved*), and which, by contrast, placed greater emphasis on equality or freedom (e.g., *Culturally Engaged Supporters*).

2 RESULTS

2.1 SEGMENTATION OF THE POTENTIAL CLASSICAL MUSIC AUDIENCE (PCMC)

Based on factor and cluster analyses, five segments of the potential classical music audience (PCMC) were identified (Tab. 1). These segments differ not only in their cultural lifestyles, but also in their sociodemographic characteristics and value orientations. Such differences are also significant with regard to gender dimensions, which constitute the main focus of this study.

Tab. 1: »Description of Segments

Segment	Share	Sociodemographic profile	Cultural behaviour	Value orientations (incl. gender)
Reserved	19%	Middle generation, middle socio-economic classes, higher proportion of inhabitants of small towns and rural areas than in other segments	Low cultural activity, minimal attendance at concerts or other cultural events, rather passive leisure activities (television, radio)	Inclination towards traditional attitudes, caution towards change, more frequent acceptance of traditional gender role division
Musicians	17%	Predominantly younger and middle-aged (students and young parents up to 40), higher proportion with secondary or tertiary education	Active musical involvement (instrument playing, singing), high consumption of music media, more frequent attendance at popular and alternative concerts	Openness and creativity, above-average support for balanced involvement of men and women
Emotional Cultural Traditionalists	19%	More frequently older (60+), predominance of women, divorced or widowed, lower education and income, often inhabitants of smaller towns	Interest in traditional cultural institutions (theatre, museums, classical music concerts), emphasis on cultural tradition and spiritual experiences	Respect for tradition and stability combined with empathy and openness to emotional experience, ambivalent regarding gender issues (mix of traditional and modern elements)
Culturally Engaged Supporters	22%	Predominantly students (up to 30), singles, higher education, more often residents of large cities	High frequency of participation in cultural events, broad spectrum of interests (from classical music to popular culture, exhibitions, festivals)	Openness, tolerance, emphasis on personal freedom and individual choice, strong orientation towards gender equality
Anti-Consumerist Art Lovers	23%	University-educated retirees, belonging to higher socio-economic classes, more frequently women, predominantly residents of larger cities	Strong interest in art and literature, reading, attendance at exhibitions and alternative/minority cultural events, rejection of commercial forms of culture	Critical towards consumerism and mass culture, emphasis on authenticity and quality, somewhat reserved towards liberal conceptions of gender roles, though not strictly traditionalist

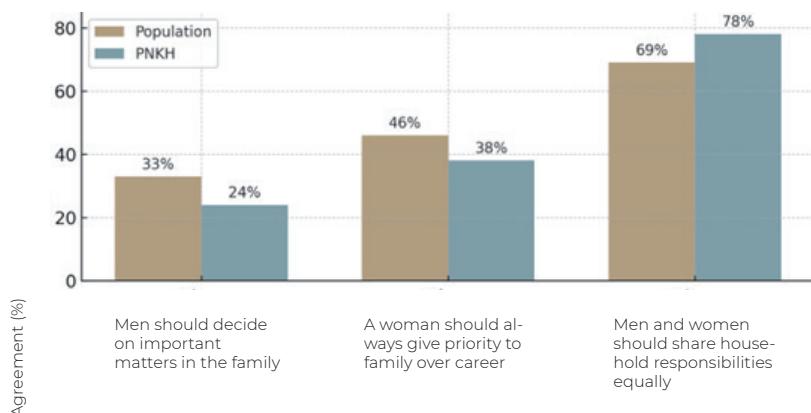
Source: Authors analysis of MML-TGI data

2.2 GENDER ATTITUDES OF PCMC COMPARED WITH THE GENERAL POPULATION

Overall, the potential classical music audience (PCMC) displays more progressive attitudes toward gender roles than the general population. The differences are clearly visible in several key statements. For instance, only 24% of PCMC agreed

with the statement that men should make the important decisions in the family, compared with 33% in the general population. Similarly, 38% of PCMC agreed that women should always prioritize family over career, compared with 46% in the general population. Conversely, 78% of PCMC expressed agreement with the statement that men and women should share responsibility for the household equally, compared with only 69% in the population as a whole. These differences are statistically significant (χ^2 , $p < 0.001$) and indicate that PCMC tends toward a more egalitarian conception of gender roles (Chart 1).

Chart 1: »Attitudes toward Gender Roles – PCMC vs. General Population



Source: Authors analysis of MML-TGI dataset

Within the PCMC group itself, however, attitudes vary considerably across the identified segments. The *Reserved* segment comes closest to traditional roles. Nearly 50% agree with the statement that women should always prioritize family over career – above the PCMC average and only slightly below the population level. This segment also shows the lowest support for equal sharing of domestic responsibilities (about 70%, compared to 78% among PCMC overall).

Musicians, by contrast, express the strongest support for balanced gender involvement in family life—over 85% agree, making them one of the most egalitarian groups. Fewer than 20% agree with the notion that men should make the important decisions in the family, which is well below the population average.

Emotional Cultural Traditionalists occupy a middle ground. Approximately 42% endorse the traditional idea that women should prioritize family, yet more than three-quarters support equal sharing of domestic responsibilities. Their profile can be described as ambivalent – combining respect for tradition with acceptance of modern egalitarian principles.

Culturally Engaged Supporters represent the most progressive segment. They are the most likely to reject traditional statements – for example, only 15% agree that men should have the final say in family decisions, and fewer than 30% agree that women should always prioritize family over career. By contrast, more than 85% support equal involvement of both genders in household responsibilities.

Anti-Consumerist Art Lovers are positioned between these poles. Around 35% agree with the traditional role of women in relation to family, and about 25% endorse male dominance in decision-making – lower than the general population, but higher than the *Culturally Engaged Supporters*. Approximately 75% express support for gender equality. Their stance can thus be described as less traditional than that of the *Reserved*, but also less progressive than the *Musicians* or *Culturally Engaged Supporters*.

In summary, PCMC as a whole is more egalitarian than the Czech population, with the most progressive attitudes found among the *Culturally Engaged Supporters* and *Musicians*, while the *Reserved* segment emerges as the closest to a traditional model of gender roles.

2.3 GENDER ATTITUDES WITHIN THE SEGMENTS OF PCMC

A factor analysis of attitudinal items relating to gender roles within the group of potential classical music audiences (PCMC) revealed three core dimensions:

- **Traditional Roles** – agreement with statements emphasizing the dominant position of men and the primacy of women's family responsibilities over career aspirations.
- **Balance** – acceptance of an equal involvement of men and women in household responsibilities and decision-making.
- **Freedom** – emphasis on individual autonomy and flexibility of gender roles, coupled with the rejection of rigid expectations.

Together, these three dimensions explain nearly half of the total variance and provide a foundation for comparing the individual segments.

Table 2 presents the differences between the segments. The values presented in Table 2 represent standardized mean factor scores for each segment (PCMC mean = 0). Positive values indicate an above-average endorsement of the respective gender-attitude dimension within the PCMC group, whereas negative values indicate a below-average endorsement. Values close to zero suggest attitudes comparable to the PCMC average. Differences between segments are statistically significant (ANOVA, $p < 0.001$).

Tab. 2: »Factor scores for gender attitude dimensions by segment

Segment	Traditional Roles	Balance	Freedom
Reserved	0.35	-0.12	-0.28
Musicians	-0.27	0.41	0.05
Emotional Cultural Traditionalists	0.08	0.03	-0.10
Culturally Engaged Supporters	-0.31	0.33	0.47
Anti-Consumerist Art Lovers	0.14	-0.09	-0.12

Source: Authors analysis of MML-TGI dataset

The segment of the *Reserved* shows the highest mean score on the dimension of Traditional Roles (+0.35 relative to the PCMC mean) and, conversely, a below-average score on Freedom (-0.28). Their score on Balance is also slightly below average (-0.12). This corresponds to their overall profile as a more value-conservative group, whose gender attitudes remain closest to the traditional model.

Musicians are characterized by a strongly above-average score on Balance (+0.41) and a markedly low score on Traditional Roles (-0.27). On Freedom, they remain close to the mean (+0.05). This indicates that they prioritize the equal involvement of men and women, but place less emphasis on individualized conceptions of gender.

Emotional Cultural Traditionalists display relatively ambivalent results: their

score on Traditional Roles is close to the mean (+0.08), their score on Balance is also average (+0.03), and they fall slightly below average on Freedom (-0.10). Their profile confirms that they oscillate between respect for tradition and acceptance of more modern perspectives, without committing strongly to either side.

Culturally Engaged Supporters represent the most progressive segment. Their score on Freedom is substantially above average (+0.47), as is their score on Balance (+0.33), while their score on Traditional Roles is below average (-0.31). This profile demonstrates not only support for equality but also an explicit rejection of rigid gender norms, in favour of individual freedom.

Anti-Consumerist Art Lovers are positioned between the *Reserved* and the more progressive groups. Their score on Traditional Roles is slightly above average (+0.14), while their scores on Balance (-0.09) and Freedom (-0.12) are both slightly below average. Although not strictly conservative, their reluctance toward a more flexible conception of gender roles is evident.

The findings demonstrate that PCMC segments differ significantly not only in their cultural practices but also in their perceptions of gender roles. *Culturally Engaged Supporters* and *Musicians* embody the most progressive values, particularly in terms of equality and freedom. *Reserved*, in contrast, represent the segment most closely aligned with traditional gender role patterns. *Emotional Cultural Traditionalists* and *Anti-Consumerist Art Lovers* are located between these poles, occupying rather ambivalent or reserved positions.

These differences underscore that the potential audience for classical music in the Czech Republic is not homogeneous, and that gender attitudes constitute one of the key dimensions that meaningfully distinguish the segments.

3 DISCUSSION

Our analysis has shown that the potential audience for classical music in the Czech Republic (PCMC) is, on average, more egalitarian in its views on gender roles than the general population, both in relation to household division of labour and family decision-making. At the same time, however, attitudes vary markedly across audience segments: the *Culturally Engaged* and *Musicians* stand on the pro-

gressive pole, while the *Reserved* approximate a more traditional model; *Emotional Cultural Traditionalists* and *Anti-Consumerist Art Lovers* occupy intermediate, ambivalent positions. These differences are also confirmed by the three-factor structure of Traditional Roles – Balance – Autonomy, where segments consistently line up along a conservative–progressive axis.

3.1 COMPARISON WITH INTERNATIONAL SCHOLARSHIP

Female predominance in “high” cultural participation

A large body of comparative research confirms that women participate in highbrow cultural activities (including classical concerts) more often than men, even after controlling for education, age or status. Bihagen and Katz-Gerro (2000) demonstrate higher participation among women in Sweden and the persistence of this gap over time; Christin (2012) shows for the US that part of the difference stems from early socialisation into the arts and from gender-specific meanings of status. This literature helps interpret the Czech picture: if the PCMC contains an above-average share of women, this may contribute to its overall more egalitarian attitudes compared to the general population (Bihagen & Katz-Gerro, 2000; Christin, 2012).

Gendered motivations and barriers to participation

Research on classical music audiences has long distinguished between intrinsic motivations (the music itself, aesthetic experience) and extrinsic motivations (sociability, atmosphere, the feeling of “being there”), while newcomers often face uncertainty about “etiquette” and the need for contextualization (Dobson, 2010; Dobson & Pitts, 2011; Pitts, 2020). In a broader sample of performing arts, NEA studies identify the most common barriers as lack of time, cost and accessibility; the main drivers are social motives and learning opportunities (Iyengar & Grantham, 2015; Dwyer et al., 2020). These mechanisms are not inherently “gendered”, but when combined with unequal domestic care responsibilities and role norms, they affect women and men differently – and thus differentiate PCMC segments. For *Reserved*, barriers prevail and traditional norms lower motivation for change; conversely, *Culturally Engaged* and *Musicians* display open, “learning-oriented” motivations and lower sensitivity to ritualized codes of behaviour (Dobson, 2010; Dobson & Pitts, 2011; Pitts, 2020; Iyengar & Grantham, 2015; Dwyer et al., 2020).

Linking gender attitudes and cultural consumption

Previous research shows that gender is an independent predictor of participation in highbrow culture, even when controlling for education, age and socioeconomic status (Bihagen & Katz-Gerro, 2000; Christin, 2012). At the same time, participation is shaped not only by resources, but also by perceived inclusion and familiarity with the cultural field (Dobson, 2010; Pitts, 2020).

Our findings align with this framework. Segments characterized by stronger endorsement of gender equality and individual freedom – namely *Musicians* and *Culturally Engaged Supporters* – also display higher levels of cultural activity, broader repertoires of cultural consumption and greater openness to innovative or hybrid concert formats. Their egalitarian attitudes appear to correlate with a sense of cultural confidence and a lower sensitivity to implicit norms and conventions of the classical concert. By contrast, the *Reserved* segment, which scores highest on Traditional Roles and lowest on Freedom, exhibits lower cultural activity and a more cautious approach to cultural participation. For this group, traditional gender norms may reinforce a preference for familiar formats and increase sensitivity to the “rules of the game” governing classical music attendance. *Emotional Cultural Traditionalists* and *Anti-Consumerist Art Lovers* occupy intermediate positions, combining selective cultural engagement with ambivalent gender attitudes.

Taken together, these results suggest that gender attitudes are not merely background characteristics, but are meaningfully intertwined with patterns of cultural consumption and participation within the potential audience for classical music.

Structural inequalities and signals to audiences

While the MML-TGI data analyzed in this study do not directly capture perceptions of institutional inequality or representation within classical music organizations, the interpretation of the following findings draws on a substantial body of international research on structural gender imbalances in the field. Numerous studies have documented the persistent underrepresentation of women in orchestras, leadership positions and concert repertoires. Although the introduction of blind auditions significantly increased women’s chances of being recruited into orchestras (Goldin & Rouse, 2000), programming practices continue to feature works by female composers only marginally (Donne Women in Music,

2021). From the perspective of feminist cultural sociology, such imbalances function as symbolic signals that shape perceptions of who belongs in a given cultural field and whose participation is considered legitimate (Scharff, 2017). In this context, the present findings suggest that audience segments characterized by more progressive gender attitudes – particularly *Culturally Engaged Supporters* and *Musicians* – may be more responsive to inclusive framing and to the visible presence of women on stage and in repertoires. Conversely, segments oriented more strongly towards traditional gender norms may prioritize continuity and familiarity over representational change. Although these interpretations extend beyond the direct measurement capabilities of the MML-TGI dataset, they provide a theoretically grounded framework for understanding how audience-side gender attitudes interact with structural conditions on the supply side of classical music.

3.2 RELEVANCE FOR THE CZECH CONTEXT

Until now, systematic data on gender attitudes within Czech classical music audiences, and their internal segmentation, have been lacking. Our study thus complements international literature by introducing a local pattern: the PCMC is overall more egalitarian than the general population, but far from homogeneous. This is not a marginal detail but strategic information for cultural policy and institutional management: marketing, programming and audience services should attend not only to socio-demographics but also to value-based differences in gender attitudes within the PCMC (c.f. Van der Hoeven, 2019, on the social and cultural value of live music and the importance of inclusive policies).

3.3 PRACTICAL IMPLICATIONS AND MANAGERIAL RECOMMENDATIONS

Programme representation and visibility

Sustained – not one-off – balancing of repertoires (more works by female composers, positions for female conductors and soloists), combined with explicit communication of these choices, strengthens perceived inclusion and reduces “signals of inequality”. The impact of blind auditions showed that procedural adjustments can reduce structural barriers; by analogy, curatorial and programming

procedures on the supply side can be revised (Goldin & Rouse, 2000; Donne Women in Music, 2021).

Concert formats and framing of experience

For new and potential attendees, contextualization, stage moderation, demystification of etiquette, shorter or lighter formats and explanatory elements before or after concerts all reduce anxiety about unfamiliarity and strengthen the feeling of “I belong here”. This is crucial for the *Reluctant* and *Emotional Cultural Traditionalists* (Dobson, 2010; Dobson & Pitts, 2011; Pitts, 2020).

Removing practical barriers

International evidence confirms that the most common obstacles are time, cost and logistics. Effective responses include variable ticketing, early-ending and family-friendly scheduling, solutions for access/parking and “bring-a-friend” offers (Dwyer et al., 2020; Iyengar & Grantham, 2015). These interventions are gender-sensitive without being overtly “gendered” – they improve comfort particularly where domestic and caregiving responsibilities, and time constraints, fall disproportionately.

Segment-specific communication by values

Culturally Engaged Supporters: highlight novelty, autonomy, cross-genre formats and community outreach.

Musicians: emphasise depth of content (inside-the-score features, compositional stories).

Reserved: provide a comprehensible, safe framework of tradition, clear expectations and shorter formats.

Segment-specific communication strategies should be aligned with the dominant value orientations and motivational structures of individual audience groups. For *Culturally Engaged Supporters*, effective communication should emphasise autonomy, openness, novelty and cross-genre experimentation, highlighting the social relevance of music and its connections to broader cultural and civic themes. *Musicians*, by contrast, are more responsive to content-oriented framing that foregrounds artistic depth, such as insights into compositional processes, interpretative choices and the craftsmanship behind musical performance.

In the case of the *Reserved* segment, communication should provide a clear, predictable and reassuring framework rooted in tradition. This includes explicit

guidance regarding concert formats and expectations, an emphasis on continuity and familiarity and the presentation of programmes in a way that reduces uncertainty and perceived entry barriers, for example through shorter or less demanding concert formats. These mappings draw on typologies of motivations and first-time audience experiences (Roose, 2008; Dobson, 2010; Pitts, 2020).

3.4 LIMITATIONS AND FUTURE RESEARCH

Our findings are based on secondary analysis of MML-TGI (2021) data, specifically a battery of statements on gender roles. This operationalization does not capture the full spectrum of gender (e.g., non-binary identities, intersectionality). Results are also time-bound to the post-pandemic year 2021, and we describe associations rather than causal relationships. Future research will address these limitations directly: (a) qualitative inquiry (in-depth interviews/focus groups) in each segment to unpack concrete barriers and motivational narratives; (b) longitudinal monitoring (trend waves) to distinguish period effects from stable patterns; (c) experimental testing of different framing formats (e.g., etiquette demystification, story-driven introductions of female composers' works) on perceived inclusion and willingness to attend; (d) international comparison (using European data sources and case studies). These steps will give more robust conclusions on how exactly gender attitudes shape cultural participation and which interventions have demonstrable impact in the Czech context.

CONCLUSION

The study has shown that the potential audience for classical music in the Czech Republic (PCMC) holds more egalitarian views on gender roles than the general population: 24% of PCMC agree that the man should decide on important family matters (vs. 33% in the population); 38% believe that women should always prioritize family over career (vs. 46%); and 78% endorse equal sharing of household responsibilities (vs. 69%). At the same time, PCMC is clearly not homogeneous: in the five-segment typology, the *Culturally Engaged Supporters* and *Musicians* occupy the progressive pole (higher Balance and Freedom), while the *Reserved* incline towards a traditional model, and *Emotional Cultural Traditionalists* together with *Anti-Consumerist Art Lovers* take intermediate, ambivalent positions.

The contribution of this study is twofold. Theoretically, it provides the first comprehensive, data-driven picture of the intersection between gender attitudes and audience segmentation for classical music in the Czech context, and situates it within international discussions on gender and cultural participation. Practically, it offers concrete leverage points for audience development: long-term balanced and transparently communicated programming (visibility of women on stage and in repertoires), the “demystification” of the concert experience (contextualization, moderation, shorter and more accessible formats) and targeted reduction of barriers related to time, cost and logistics (family-friendly scheduling, variable pricing, social tickets). These steps should be tailored to audience segments: a safe and comprehensible framework for the *Reserved*; depth and novelty for *Musicians* and *Culturally Engaged Supporters*; emphasis on authenticity for the ambivalent segments.

Our findings are time-bound to 2021 and rest on secondary data and a specific operationalization of gender attitudes. Subsequent research should address these constraints directly: qualitatively unpack motivations and barriers in individual segments, track developments through trend waves, experimentally test different framing effects and undertake international comparisons. In this way, the evidence base for managerial decision-making and strategies of inclusive audience development in Czech music institutions can be significantly strengthened.

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INCLUSION AND SOCIAL PARTICIPATION THROUGH MUSIC: A LONGITUDINAL QUALITATIVE STUDY IN RESIDENTIAL CHILDCARE

Alois Daněk

ABSTRACT

The role of structured musical participation in fostering inclusion and social engagement among children living in residential childcare is examined. The research was conducted in cooperation with a Czech children's home and the Harmony Foundation, which operates an orchestra inspired by El Sistema model. A participatory qualitative design was employed, combining sustained observation, semi-structured interviews with children and educators and reflective team discussions. Data were analyzed through interpretative phenomenological analysis and systematic coding. The findings indicate that regular collective music-making enhanced emotional regulation, self-confidence and perseverance. Children showed a greater willingness to collaborate and form positive peer relationships, while educators observed more cohesive group dynamics and increased motivation. Public performances strengthened the sense of belonging and personal accomplishment, particularly among children with prior experiences of instability and social exclusion. The results provide empirical evidence that music-based programmes can effectively promote inclusion and social participation in residential childcare and should be regarded as an integral component of holistic educational support within this context.

Keywords: : inclusive education, residential childcare, music education, social participation, El Sistema, qualitative research, participatory action research, child development, social inclusion.

JEL Classification: A29

INTRODUCTION

Music has long been recognized as a powerful medium for human connection and expression. Within educational and social contexts, it offers opportunities to bridge personal and structural barriers, enabling children and young people to experience belonging and participation in ways that traditional forms of education often fail to achieve. The study of music as a social practice therefore extends beyond pedagogy. It touches on psychology, social work, cultural studies and ethics, linking aesthetic experience to human rights and social justice. In recent years, the concept of inclusion has moved to the centre of educational discourse. Inclusion today is not limited to the integration of children with disabilities or special educational needs but is increasingly understood as a principle that ensures equal access to learning, participation and recognition for all. In this broader sense, inclusion addresses cultural, economic and emotional dimensions of human experience. It is within this intersection that music education holds exceptional potential. Through collective artistic creation, learners develop self-awareness, empathy and cooperation, all of which are essential for social participation and civic competence.

Despite the growing recognition of music's transformative capacity, children in residential childcare often have limited access to structured musical activities. Their learning environments tend to prioritize immediate behavioural management and basic education over creative development. Yet these children are among those who could benefit most from sustained musical participation. For example, engagement in ensemble music-making can foster emotional regulation, strengthen resilience and contribute to the formation of social identity. Musical activity thus becomes not only a form of expression but also a context for rebuilding trust and social competence. The present study was conceived at the intersection of these perspectives. It builds on long-term practical experience in Czech residential childcare institution, carried out in cooperation with the Harmony Foundation, which operates an orchestra inspired by the El Sistema model. This partnership provided a rare opportunity to explore how collective music-making can function as a catalyst for inclusion and social participation among children with diverse life experiences. By examining their musical and

interpersonal development over time, the research seeks to contribute to a broader understanding of how music can enhance educational and social outcomes in complex institutional environments. The findings are situated within broader interdisciplinary discussions on inclusion, well-being and social development. Empirical evidence connecting artistic experience with psychosocial growth is provided, and the dialogue between education, the social sciences and the humanities is further developed. Through this interdisciplinary lens, the article situates musical participation not as an isolated cultural activity, but as an integral part of inclusive and holistic education.

1 MUSIC EDUCATION FOR CHILDREN WITH SPECIAL EDUCATIONAL NEEDS

Music education provides a flexible and richly textured learning environment that accommodates diverse developmental trajectories and communication styles, positioning artistic engagement (or just an engagement into art) as a legitimate and equitable pedagogical pathway rather than a compensatory intervention. Structured participation in musical activities activates attentional systems, supports working memory processes, refines motor planning and coordination and facilitates emotional signalling and affective attunement, thereby expanding opportunities for meaningful interaction and skilled participation among learners who may not thrive in language-dominant or behaviourally rigid classrooms (Juntunen & Sutela, 2023; Hedayati et al., 2016; Holochwost et al., 2017). The multimodal sensory dimensions of rhythm, movement and sound allow students to explore self-expression, refine self-regulation and develop persistence in an environment that values exploration, embodied engagement and responsiveness to others. Shared rehearsal and performance contexts also strengthen confidence, social reciprocity and mutual recognition, reinforcing a sense of competence and belonging while also cultivating adaptive emotional and cognitive strategies (Blasco-Magraner et al., 2021). Crucially, inclusive music-education approaches deliberately resist deficit interpretations and the lowered expectations that often accompany special-education categorisation, which can restrict curricular access, curtail aspiration and undermine long-term developmental prospects (Adamek & Darrow, 2005; Hibel et al., 2010). By sustaining ambitious goals, affirming stu-

dents' agency and integrating supportive scaffolding with creative freedom, music education functions as a substantive educational arena that stimulates cognitive growth, nurtures identity, expands communicative repertoires and strengthens social participation for children with varied learning profiles (Bovsunivska, 2022; Daněk, 2024; Daněk, 2025).

2 PROGRAMME EL SISTEMA

El Sistema is a globally recognized music-social programme founded in Venezuela in 1975 by the musician and economist José Antonio Abreu (Hernandez-Estrada, 2012; Tunstall, 2013). Established amid deep socio-economic instability marked by poverty, unemployment and rising crime, the initiative sought to counteract the social exclusion of vulnerable children by providing free access to high-quality orchestral education (Tunstall, 2020). José Antonio Abreu conceptualized music as a catalyst for social transformation, emphasizing its preventive and developmental functions, particularly for children exposed to structural disadvantage (Tunstall, 2013). With state support, he created the “Fundación del Estado para el Sistema Nacional de las Orquestas Juveniles e Infantiles de Venezuela”, known by the acronym FESNOJIV, later renamed the Simón Bolívar Music Foundation, though the programme is internationally known as El Sistema.

From its inception, the programme has been characterized by an explicit social mission. Music is understood not solely as an artistic pursuit, but as a medium for reducing social risks and fostering civic engagement. Scholarship identifies five foundational principles underpinning El Sistema: social transformation, orchestral participation, intensive instruction, accessibility and cooperation (Booth & Tunstall, 2014; Govias, 2011; Tunstall & Booth, 2016).

- Social transformation. The core objective is to foster positive social change through active participation in musical ensembles. Social and artistic goals are interdependent; musical excellence is pursued in parallel with the cultivation of pro-social dispositions and community responsibility.
- Orchestral participation. Learning takes place primarily in ensemble settings. Collective instruction and rehearsal are treated as efficient and equitable pedagogical strategies, enabling students to develop musical and socio-emotional competencies through shared practice and mutual support.

- Intensive instruction. Ensembles rehearse several times per week, and frequent public performances are considered integral to progression. Regular stage experience reinforces discipline, motivation and self-efficacy, while also strengthening community engagement and visibility.
- Accessibility. Participation is free, open to all children and explicitly directed toward socially vulnerable groups. No entrance auditions or talent screening are used; instruments and technical support are provided. This principle reflects the programme's egalitarian ethos and commitment to cultural democratization.
- Cooperation. Ensembles collaborate with families, schools, local institutions and musical organizations. This relational model extends beyond Sistema-inspired networks and seeks to establish broad-based alliances within educational, cultural and community systems (Govias, 2011).

In the Czech Republic, several initiatives draw on El Sistema's philosophy, the most prominent being the Harmony Foundation Orchestra, which applies these principles within the national musical tradition shaped by composers such as Antonín Dvořák and Leoš Janáček.

2.1 PROGRAMME EL SISTEMA AND LONG-TERM COLLABORATION WITH THE HARMONY FOUNDATION IN RESIDENTIAL CHILDCARE

The Czech adaptation of the El Sistema philosophy has been implemented by the Harmony Foundation, which acts as the programme provider and pedagogical guarantor. The residential childcare institution cooperates with the Foundation by facilitating children's participation in orchestral rehearsals and performances organized at a local primary school. This arrangement enables children in residential childcare to access structured orchestral education without financial or organizational barriers, while maintaining professional artistic and pedagogical standards. Within this partnership, children regularly attend ensemble rehearsals, instrumental lessons and public performances led by experienced music educators trained in inclusive pedagogy. The programme functions as a complementary educational space, parallel to both formal schooling and the residential institution's internal activities. It introduces a context defined by collaboration,

artistic ambition and cultural participation, allowing children to experience identity through creative achievement rather than through welfare-based roles typically associated with residential childcare. The research team conducted sustained observations of musical sessions at the primary school and systematically monitored children's emotional and social responses upon their return to the residential home. These observations revealed that regular engagement in collective music-making supported the development of self-regulation, confidence and perseverance. Children gradually displayed stronger peer relationships, increased motivation and a greater capacity for empathy and teamwork.

Over several years, this collaboration has evolved into a stable and respected component of the educational ecosystem. The orchestral programme is recognized not merely as an extracurricular activity but as a pedagogical and socially integrative intervention that enhances inclusion and belonging. Teachers, social educators and musicians cooperate closely, ensuring consistent participation, communication and mutual support across institutional boundaries. Public performances have strengthened the children's sense of pride and competence, while ongoing collaboration between the school, the orchestra and the children's home has contributed to relational stability and community cohesion. The sustained partnership between the residential childcare institution and the Harmony Foundation, which has been the subject of systematic research and observation since 2015, exemplifies how culturally grounded initiatives can bridge institutional, educational and social domains. It demonstrates the potential of music-based interventions to promote inclusion, personal growth, and social participation among children in alternative care settings.

2.2 GENERALIZED DEVELOPMENTAL PROFILE OF PARTICIPANTS IN RESIDENTIAL CHILDCARE ENGAGED IN EL SISTEMA-INSPIRED EDUCATION

Across years of engagement, a generalized portrait can be articulated of children participating in the programme within residential childcare. Many enter the initiative with fragmented educational histories, fluctuating self-esteem and limited prior experience with structured extracurricular activities. Emotional regulation skills are frequently developing, social interactions may reflect mistrust or defen-

siveness shaped by earlier adversity and academic motivation can be inconsistent. Despite these vulnerabilities, children often display pronounced creative potential, sensitivity to recognition and strong latent motivation when supported by clear expectations, stability and opportunities to achieve tangible success. Participation in ensemble-based music practice acts as a mediating context in which these characteristics evolve. Early challenges with sustained attention, frustration tolerance and cooperative behaviour gradually diminish as children internalize rehearsal routines and experience shared artistic purpose. Progressive improvements are observable in discipline, self-regulation and collaborative functioning. Children begin to perceive their individual contribution as meaningful within a collective framework and, over time, some assume informal leadership or mentoring roles. These trajectories indicate that structured musical participation strengthens resilience, promotes identity formation and supports socio-emotional maturation. Although developmental progress remains non-linear, the programme provides an enduring anchor that facilitates repeated experiences of competence, belonging and agency – capacities transferable to academic and social contexts beyond the musical setting

3 METHODOLOGY

The present study is based on continuous empirical work conducted since 2015, enabling longitudinal insights into the developmental and social outcomes of sustained music-based participation in residential childcare. Across this period, successive cohorts of children living in residential childcare were involved. The initial phase included a group of 15 children, followed by a smaller cohort of 3 children after their transition out of the programme. In 2025, a cohort of 10 children participated in research examining interaction with a digital music education application, and the study currently continues with a cohort of 3 children. A qualitative design grounded in an interpretive paradigm was adopted, recognizing that processes of musical participation and social inclusion are embedded in subjective meaning and relational experience. The methodological approach is informed by Participatory Action Research, which positions participants as co-constructors of knowledge and conceptualizes research as a collaborative endeavour oriented toward improvement in educational and social practice

(Baum, 2006; McIntyre, 2008). This orientation reflects the ethical and pedagogical assumption that children in residential childcare and inclusion-focused music programmes possess lived expertise that must inform the analytic process (Cornish et al., 2023; Shamrova & Cummings, 2017).

3.1 DATA COLLECTION

Multiple complementary strategies supported the thick description of lived experience in this setting. Prolonged observation documented rehearsals, ensemble practices and public performances, enabling the portrayal of interactional dynamics, emotional expression, engagement patterns and peer cooperation in authentic musical environments (Boyko, 2013). Semi structured interviews were conducted with children and educators to explore perceptions of belonging, motivation, development and the social meaning of musical participation. The interview format ensured structure while allowing space for participants to articulate individual perspectives and agency (Espedal, 2022; Dunwoodie et al., 2023). Group dialogues with selected participants further elaborated emergent themes and enabled collective reflection in line with participatory principles.

3.2 ANALYTIC STRATEGY

Data were analyzed through an integrative framework combining Interpretative Phenomenological Analysis and elements of Grounded Theory. Interpretative Phenomenological Analysis supported a detailed examination of subjective experience and identity related processes associated with musical participation (Alase, 2017; Smith et al., 2009). In parallel, analytic procedures associated with Grounded Theory facilitated systematic coding, category development and the progressive generation of conceptual patterns grounded in the data (Charmaz & Thornberg, 2021; Makri & Neely, 2021). Coding and analytic memos were revisited iteratively to preserve sensitivity to participants' perspectives while ensuring conceptual precision. Peer consultation and practitioner reflection enhanced interpretive rigour and strengthened confirmability of findings.

3.3 ETHICAL CONSIDERATIONS

Ethical procedures followed international standards for research involving children in socially sensitive contexts. Informed consent and assent were secured,

participation was voluntary and withdrawal could occur at any time without consequences. All data were anonymized and securely stored. Emotional safety and respect for the autonomy of children were prioritized throughout the process (Kiernan & McMahon, 2024). In addition, a value sensitive stance guided the integration of digital tools during fieldwork to ensure cultural sensitivity, protection of personal information and accuracy of mediated content (Jacobs & Huldtgren, 2021). The complete research protocol, including instruments and consent procedures, was submitted for review and approved by the institutional ethics committee prior to the commencement of data collection (Ambis University, 2025).

4 RESULTS

The analysis reveals a coherent pattern of developmental, relational and identity-forming processes emerging through sustained participation in an El Sistema-inspired orchestral environment. The findings do not describe uniform pathways, but instead illustrate gradual advancement shaped by individual histories, group dynamics and pedagogical structure. Evidence from observations, interviews and collaborative reflections indicates that collective music-making operates as a socially generative practice in which children construct belonging, acquire socio-emotional competencies and negotiate emerging identities within a supportive yet demanding cultural setting. The following thematic areas summarize these core outcomes.

4.1 SOCIAL INCLUSION AND PARTICIPATION TRAJECTORIES

The findings demonstrate that structured collective music-making within an El Sistema-inspired environment fosters meaningful forms of participation among children with diverse educational needs. Participants consistently described the ensemble setting as a context in which they experienced acceptance, legitimacy and shared purpose. Observation data indicated progressive movement from tentative participation toward confident engagement, characterized by increased willingness to take responsibility within rehearsals and collective performance settings. Educators confirmed that children who initially demonstrated avoidant behaviour or limited peer interaction gradually adopted collaborative roles, evidencing strengthened social presence and group identification.

4.2 DEVELOPMENT OF SOCIO-EMOTIONAL COMPETENCIES

Interview and observation evidence revealed improvements in self-regulation, emotional expression and persistence during demanding tasks. Children articulated the orchestra as a “place to calm down” and “try again”, indicating the emergence of internalized coping strategies and tolerance for frustration. Educators reported enhanced task focus and delayed gratification, particularly visible during extended rehearsals and performance preparation. These behavioural indicators corresponded with qualitative accounts of reduced impulsivity, greater emotional vocabulary and increased confidence in communication with peers and adults.

4.3 IDENTITY FORMATION AND AGENCY

Participation supported positive identity positioning. Children recurrently described themselves as “musicians” and “members of the orchestra”, suggesting a shift from deficit-framed self-perceptions frequently associated with special-education experiences toward aspirational identities aligned with competence and belonging. Observational field notes documented moments in which children initiated musical solutions, volunteered leadership during section practice and proposed performance ideas. These instances signal the development of agency and active contribution rather than passive receipt of support.

4.4 CULTURAL BELONGING AND COMMUNITY CONNECTION

The programme served as a bridge between residential childcare and community life. Public performances and interactions with partner cultural institutions created opportunities for social recognition and visibility. Participants described these events as occasions where “people see us differently”, suggesting a redefinition of social status and challenge to stigma associated with residential childcare. Residential childcare professionals highlighted the programme’s role in reducing isolation and building relational capital, noting strengthened ties between children, staff, families and local cultural actors.

4.5 PEDAGOGICAL DYNAMICS AND SUPPORTIVE CONDITIONS

Analytical comparison across sessions underscored the importance of sustained

intensity, collective practice and consistent pedagogical expectations. Children responded positively to high musical standards, which they associated with fairness and respect. Structured routines combined with emotionally attuned support emerged as enabling conditions. Educators emphasized that musical rigor did not conflict with inclusion but served as a motivating structure, reinforcing the principle that excellence and accessibility can operate simultaneously within inclusive cultural education.

4.6 CHALLENGES AND STRUCTURAL CONSIDERATIONS

Despite demonstrated benefits, several constraints emerged. Fluctuating emotional states, histories of adversity and variability in attention capacity occasionally interrupted participation. Breaks, individual coaching and predictable routines mitigated these challenges. Logistical barriers such as transport, instrument maintenance and coordination with residential schedules influenced continuity of engagement. These factors highlight the need for institutional coordination and resource stability when implementing inclusion-focused music programmes in childcare settings.

The results indicate that intense, socially embedded orchestral participation contributes to social inclusion, identity development and emotional growth among children in residential childcare. Music functioned not as an auxiliary enrichment activity, but as a structured socio-educational system facilitating belonging, competence, aspiration and relational integration. The data suggest that El Sistema-based practice can operate as a socially transformative educational environment when embedded in long-term relational pedagogies and supported by institutional cooperation.

5 DISCUSSION

The findings contribute to a growing body of evidence demonstrating that intensive collective music-making can operate as an inclusive socio-educational environment for children in residential childcare. Participation in ensemble-based music education supported not only musical progression but also social affiliation, emotional regulation and identity formation. In this context, the orchestra functioned as a structured social system in which children negotiated roles, recei-

ved recognition and developed competencies associated with long-term developmental benefit. These outcomes resonate with insights from research on El Sistema implementations in different contexts, which emphasize belonging, collective responsibility and exposure to high artistic expectations as meaningful drivers of psychosocial growth.

The results also refine assumptions often associated with socially oriented music programmes. Inclusion was not grounded in reduced expectations or protective support, but in sustained challenge moderated by relational trust. Intensity, continuity and public performance acted as catalysts for agency and perseverance. This dynamic aligns with perspectives suggesting that children in residential childcare benefit from environments that affirm capability, offer visibility and support ambition rather than focusing solely on remediation. The programme, therefore, represents more than a cultural intervention. It functions as a mechanism for constructing social capital, expanding participation in public life and contesting deficit-based narratives commonly associated with residential childcare.

At the same time, constraints with implications for policy and practice are highlighted. Participation was shaped by institutional coordination, stability of staffing, emotional fluctuation and resource availability. These complexities confirm that cultural inclusion cannot be viewed as an isolated pedagogical practice but must be embedded within organizational, financial and social infrastructures capable of sustaining long-term engagement. Supporting arts-based inclusion in institutional environments requires investment in qualified educators, inter-sectoral cooperation and continuity of provision. The evidence also suggests that ethical attention to voice and agency is essential. When children are recognized as active contributors rather than objects of intervention, motivation and developmental gains strengthen, and the cultural practice becomes aligned with wider principles of child rights and participation.

Inclusive orchestral practice is positioned as a form of socially engaged education that intersects with social welfare, cultural policy and the right to meaningful participation. Music, in this setting, did not merely supplement daily routines. It created a developmental landscape in which children could rehearse confidence, solidarity and public recognition, extending the scope of what residential childcare can offer.

6 RECOMMENDATIONS

The evidence indicates that inclusive orchestral programmes can enhance social integration, emotional development and cultural participation for children in residential settings. To translate these findings into durable practice, several strategic directions emerge.

- Educational and social institutions should incorporate structured arts-based learning into residential childcare environments as a recognised pedagogical pathway. Music education in this form is most effective when it is sustained, collective and tied to real performance contexts. Programmes should therefore prioritize regular rehearsal schedules, competent artistic leadership and publicly visible outcomes that reinforce dignity and accomplishment.
- Systems of support must be designed to sustain participation over time. Coordination among residential facilities, schools and cultural organizations is essential to ensure logistical continuity. Stable funding for instruments, instruction and transportation should be regarded as a necessary investment rather than supplementary expenditure. Partnerships with community arts institutions and conservatories may further strengthen quality and continuity.
- Training for music educators and residential childcare professionals should include competencies related to trauma-informed practice, inclusive pedagogy and collaborative reflection. Children in residential childcare require learning environments that balance high expectations with emotional sensitivity. Professional preparation that bridges artistic excellence with social pedagogy is critical for maintaining this balance.
- Participatory structures should be strengthened. Children benefit when they are invited to co-design aspects of the programme, provide feedback and hold visible roles in artistic decisions. Maintaining channels for voice supports self-efficacy and aligns practice with international commitments to child participation in decisions that shape their lives.
- Policymakers should recognize arts-based inclusion as part of broader social integration frameworks. Cultural programmes within childcare systems contribute to social cohesion, reduction of stigma and development of human

capital. Embedding them into national strategies on inclusive education, child welfare and cultural participation can enhance their sustainability and impact.

CONCLUSION

Collective music education inspired by *El Sistema* is shown to function as a socially generative space for children in residential childcare, in which participation acquires developmental, relational and civic meaning. Through sustained ensemble practice, public performance and pedagogical expectations that affirm capability, children cultivated competencies associated with belonging, self-regulation, confidence and agency. The orchestral setting enabled them to enter a symbolic and social world not typically accessible in residential childcare, one in which they were recognized as contributors, artists and community members rather than recipients of support. These findings indicate that music, when embedded in long-term pedagogical relationships and aligned with principles of inclusion, can provide a platform for social mobility, identity reconstruction and the cultivation of dignity.

The evidence also underscores that such outcomes are neither automatic nor superficial. They depend on continuity of provision, relational stability, professional expertise and an institutional culture that treats cultural participation as a right rather than an enrichment privilege. When these conditions are present, music becomes a medium through which children rehearse forms of citizenship, experience public acknowledgment and encounter expectations that transcend the boundaries of residential childcare. When absent, the potential of music risks reduction to episodic activity without structural impact. Beyond documenting positive change, a repositioning of arts-based practice within the discourse on social inclusion and child welfare is proposed. The cultural sphere should not be interpreted as peripheral to education or social support but as a domain in which identity formation, collective agency and participation in shared symbolic life are enacted. The results invite educational and social institutions to regard musical participation as part of a broader architecture of rights, opportunities and social justice for young people in residential childcare. In doing so, they signal a future in which access to aesthetic experience and collective creation becomes a structural expectation within inclusive policy rather than an exceptional initiative.

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ZELENÉ VEREJNÉ OBSTARÁVANIE NA SLOVENSKU: VEREJNÁ POLITIKA VERZUS PRAX¹

GREEN PUBLIC PROCUREMENT IN SLOVAKIA: PUBLIC POLICY VS REALITY

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ABSTRAKT

Slovensko patrí medzi krajiny, kde je zelené verejné obstarávanie oficiálne súčasťou legislatívneho systému, avšak napriek všetkým proklamáciám súčasná miera jeho využívania je minimálna a daleko od stanoveného cieľa v existujúcich politických dokumentoch. Cieľom tohto článku je zdokumentovať hlavné faktory zodpovedné za to, že politiky zeleného verejného obstarávania sa v praxi dostatočne nerealizujú. Výsledky naznačujú, že hlavným limitujúcim faktorom je byrokratická administratívna kultúra, vyznačujúca sa snahou o minimalizáciu rizika. Takáto kultúra je do určitej miery „vynútená“ viacerými problematickými aspektmi procesu verejného obstarávania na Slovensku, najmä spôsobom fungovania kontrolného systému.

Kľúčové slová: zelené verejné obstarávanie, Slovensko, prekážky, byrokracia, averzia k riziku

JEL klasifikácie: H8, D2

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ABSTRACT

Slovakia is one of the countries where green procurement is part of the legislative process; however, despite the proclamations, its current level of use is minimal and does not correspond to the objectives set in the existing policy documents. The aim of this article is to document the main factors responsible for the fact that green procurement policies are not sufficiently implemented. The results show that the main limiting factor is the bureaucratic administrative culture characterized by an effort to minimize risk. This culture is, to a certain extent, "forced" by multiple problematic aspects of the public procurement process in Slovakia, in particular the way the control system works.

Key words: green public procurement, Slovakia, obstacles, bureaucracy, risk aversion

JEL Classification: H8, D2

ÚVOD

V prvých rokoch svojho fungovania sa verejné obstarávanie používalo na výber „najlepšej ponuky“. V súčasnosti sa však čoraz viac presadzuje pojem udržateľné verejné obstarávanie (známe aj ako strategické verejné obstarávanie alebo sociálne zodpovedné verejné obstarávanie) – mnohé politické dokumenty navrhujú využívať verejné obstarávanie aj na dosiahnutie špecifických hospodárskych, sociálnych a environmentálnych cieľov.

Pokiaľ ide o environmentálne ciele, napríklad Európska komisia navrhla minimálne povinné kritériá a ciele v oblasti zeleného verejného obstarávania (GPP) v sektorovej legislatíve. Postupne plánuje zaviesť povinné podávanie správ o GPP s cieľom monitorovať jeho uplatňovanie.

V podmienkach Slovenska je GPP právne kodifikované v zákone o verejném obstarávaní a je aj obsahom viacerých verejných politík. Reálne údaje o úrovni implementácie GPP na Slovensku však naznačujú, že optimistické ciele definované v existujúcich politických dokumentoch sa priebežne nedarí a ani nemusí podať dosiahnuť.

V nadväznosti na fakt, že GPP sa na Slovensku stále realizuje len v obmedzenej miere je cieľom článku definovať a zdokumentovať hlavné faktory, ktoré sú zodpovedné za to, že existujúce politiky GPP sa v praxi verejného obstarávania nedostatočne realizujú. Pre naplnenie cieľa sme využili postupy kvalitatívneho výskumu, predovšetkým metódy prípadovej štúdie a expertnú metódu.

1 ZELENÉ VEREJNÉ OBSTARÁVANIE: FAKTORY A PREKÁŽKY

Zelené verejné obstarávanie je jedným z rozmerov v súčasnosti veľmi populárnej témy „udržateľného verejného obstarávania“, ktorého ciele definuje napr. Meuleman a kol. (2021: 2): (udržateľné verejné obstarávanie) „poskytuje vládam príležitosť prekročiť rámec obstarávania len od dodávateľov, ktorí dodávajú najlacnejšie produkty, a uprednostniť obstarávanie od dodávateľov, ktorí rešpektujú ľudské práva a životné prostredie. Má potenciál výrazne podporiť udržateľný rozvoj a mnohé krajiny ho môžu vnímať ako strategickú prioritu.“

Existujúce analýzy a údaje naznačujú, že potenciál GPP nie je krajinami (v Európe a vo svete) využívaný rovnomerne. Napríklad štúdia, ktorú vykonal Rosell (2021), zistila relatívne vysokú heterogenitu v podieloch GPP v rámci EÚ. Najvyššie využitie GPP v Európe štúdia zistila v krajinách ako Dánsko, Belgicko, Francúzsko a Írsko. Naopak, väčšina „postsovietských“ krajín výrazne zaostáva.

Súbor faktorov (bariér), ktoré určujú rozsah a úspech GPP je podrobne analyzovaný v odbornej literatúre a výsledky sú zhrnuté aj v článkoch typu „literature review“ – napríklad Cheng a kol. (2018). Výsledky tejto štúdie naznačujú, že existujúce štúdie sa zameriavajú na bariéry v oblasti environmentálnej politiky a environmentálnych regulácií (Grandia, 2016), na priame environmentálne aspekty (Parikka-Alhola a Nissisen, 2012) a na prax GPP (Brammer a Walker, 2011).

Z ďalších zásadných štúdií môžeme spomenúť Rosella (2021), ktorý definuje nasledujúci súbor determinantov – faktory súvisiace so špecifikami príslušnej krajiny (národná legislatíva, veľkosť vlády alebo celkový ekonomický a environmentálny rozvoj), verejný obstarávateľ (typ, funkcia a charakteristiky verejného obstarávateľa) a faktory súvisiace s procesom obstarávania (motivácia, kapacita alebo finančné obmedzenia verejného obstarávateľa). Zwan (2018) konštatuje, že rozvoj GPP limitujú hlavne normatívne, regulačné a kognitívne bariéry, iní autori diskutujú o finančných, informačných, právnych, manažérskych a politických bariénoch súvisiacich s kultúrou (napr. Brammer a Walker, 2011).

2 TEORETICKÝ RÁMEC – TEÓRIA BYROKRACIE

Hlavným teoretickým rámcom tejto štúdie je jav oportunistického správania sa byrokratov pri verejnem obstarávaní. Tento rámec považujeme v našich podmienkach za plne relevantný, aj keď nemusí byť vhodný pre všetky systémy verejného obstarávania (napríklad systém vo Veľkej Británii, ktorý funguje na základe „hodnoty za peniaze“). Dokladom toho, že tento princíp je pre podmienky Slovenska aktuálny je stanovisko expertov, ktorých sme oslovoili (viď ďalší text). Až na jednu výnimku, všetci experti súhlasili, že verejné obstarávanie v našich podmienkach je prevažne administratívny a nie manažérsky proces (!).

Relevantná teória predpokladá, že správanie sa byrokratov pri verejnem obstarávaní je charakterizované averziou voči riziku (Tversky a Kahneman, 1992; Holt a Laury, 2002; Bajooriet a kol., 2024). Nositelom averzie voči riziku je byrokrat zodpovedný za správu verejného obstarávania a formálnu zmluvu. Oportunistické správanie vyplýva z racionality obstarávateľa (Neumann & Morgenstern, 1944) a účelnosti jeho konania (Mises, 2009). Byrokrat používa oportunistické správanie na zníženie rizika neúspechu v súťaži, minimalizáciu transakčných nákladov verejného obstarávania a minimalizáciu rizika kontroly verejnej zmluvy v post-zmluvnom období verejného obstarávania (Schmidt a kol., 2016). Riziko a neistota vo verejnem obstarávaní ohrozujú postavenie byrokrata a teda typický byrokrat im predchádza a správa sa oportunisticky, vyberajúc postupy, ktoré pravdepodobne povedú k formálne bezproblémovej súťaži o verejnú zákazku. Všetko, čo by mohlo významne ohrozí bezrizikovosť procesu byrokrat oportunisticky považuje za rizikový faktor ohrozujúci jeho prácu vo verejnej správe. Výsledkom takéhoto oportunistického uvažovania je napr. mimoriadne časte uprednostnenie jedného hodnotiaceho kritéria – ceny, pred multikriteriálnym hodnotením, ktoré požadujú direktívy Európskej únie (Grega a kol., 2019).

3 PRÁVNY A POLITICKÝ RÁMEC

Slovensko patrí medzi krajiny, kde je GPP oficiálne uznávané a začlenené do legislatívneho systému. Právnym základom pre GPP v Slovenskej republike je zákon č. 343/2015 Z. z. „O verejnem obstarávaní“. Zákon umožňuje slovenským verejným obstarávateľom zohľadňovať environmentálne aspeky zmluvy vo všet-

kých fázach jej zadávania: v kvalifikačných podmienkach, v technických požiadavkách pri opise predmetu zmluvy, v kritériach hodnotenia ponúk a v osobitných podmienkach plnenia zmluvy. Stále však platí, že GPP je v Slovenskej republike predovšetkým dobrovoľným nástrojom. Novela zákona o verejnom obstarávaní z roku 2022 zaviedla povinnosť uplatňovať environmentálny pohľad pre niektorých obstarávateľov, táto povinnosť však nie je univerzálna. Environmentálne hľadiská GPP sú definované v článku 10 ods. 7 zákona o verejnom obstarávaní, ktorý ukladá verejným obstarávateľom, ktorí v kalendárnom roku začali alebo vykonali najmenej desať verejných obstarávaní, s výnimkou zmlúv s nízkou hodnotou, povinnosť zohľadňovať environmentálne a sociálne hľadiská. Obstarávateelia sú povinní použiť oba aspeky (pokiaľ ide o Slovenskú republiku, zastúpenú jej orgánmi) alebo jeden z aspektov (pokiaľ ide o obce, právnické osoby alebo ich združenia) v najmenej 6 % vykonalých verejných obstarávaní. Uznesenie vlády Slovenskej republiky č. 541/2022 tiež zaviedlo čiastočnú povinnosť uplatňovať nástroje GPP vo verejných obstarávaniach na výstavbu alebo rekonštrukciu stavebných diel. Povinnosť sa vzťahuje len na štát a ukladá povinnosť používať nástroje GPP s dôrazom na environmentálne aspeky pri stavebných prácach s finančným limitom presahujúcim 30 000 EUR. Mimo týchto povinností zostáva používanie GPP na uvážení samotného verejného obstarávateľa.

Hlavným politickým dokumentom týkajúcim sa GPP na Slovensku sú Národné akčné plány pre zelené verejné obstarávanie. Boli vydané tri národné akčné plány: NAP GPP I na roky 2007 – 2010, NAP GPP II na roky 2011 – 2015 a najnovší NAP GPP III na roky 2016 – 2020 (tento plán stále nie je aktualizovaný pre súčasné obdobie). Ďalším dôležitým dokumentom je Envirostratégia 2030. Tento dokument navrhuje, aby GPP predstavovalo minimálne 70 % celkovej finančnej hodnoty verejného obstarávania na Slovensku.

Napriek vyhláseniam a neustálemu vykonávaniu súboru činností súvisiacich s GPP sú uvádzané hodnoty využívania GPP v praxi ďaleko od stanoveného cieľa (tabuľka 1).

Tab. 1: »Prehľad zeleného verejného obstarávania v SR na roky 2019 – 2024.

Rok	Celková suma verejného obstarávania	Celková suma GPP	GPP %
2019	3,618	234	6,5
2020	3,651	173	4,7
2021	5,167	284	5,5
2022	8,572	343	4,0
2023	10,887	554	5,1
2024	9,846	857	8,7

Zdroj: vlastné spracovanie na základe údajov Úradu pre verejné obstarávanie Slovenskej republiky

Poznámka: absolútne čísla nie sú medzi rokmi porovnateľné z dôvodu meniacej sa legislatívy

4 METODIKA

V tejto štúdii používame kvalitatívne výskumné metódy. Základnou metódou je prípadová štúdia, ktorá dokumentuje spôsoby, akým na Slovensku zlyháva kontrolné proces verejného obstarávania, v danom prípade priamo zeleného verejného obstarávania (prípadová štúdia je anonymizovaná). Výber prípadovej štúdie bol daný ochotou obce a firmy, ktorá obstarávanie zabezpečovala spolupracovať pri spracovaní štúdie – jej text je overený zo strany týchto subjektov. Prípadovú štúdiu môžeme považovať za reprezentatívnu, jedná sa o veľmi častý prípad problematického výkonu kontroly vo oblasti verejného obstarávania z fondov EÚ.

V diskusii využívame aj expertnú metódu na rozvinutie poznatkov získaných prípadovou štúdiou. Zoznam expertov je nasledovný (tabuľka 2):

Tab. 2: »Zoznam expertov: GPP

Expert	Dĺžka praxe
Dodávateľ	5
Dodávateľ	10
Dodávateľ	23
Dodávateľ	12
Dodávateľ	8
Dodávateľ	17

Pokračovanie na str. 11

Expert	Dĺžka praxe
Úradník (audit verejného obstarávania)	20
Úradník (audit verejného obstarávania)	26
Úradník (audit verejného obstarávania)	22
Úradník zodpovedný za obstarávanie	20
Starosta obce	20
Úradník zodpovedný za obstarávanie	45

Zdroj: autori

Pre získanie konkrétnych údajov autori požiadali Úrad verejného obstarávania Slovenskej republiky o zoznam všetkých GPP na Slovensku na roky 2023 a 2024 (takéto súhrnné informácie nie sú verejne dostupné). Po obdržaní tohto zoznamu sme vybrali všetky prípady GPP realizované v daných rokoch miestnymi samosprávami. Z tohto vzorku sme náhodne vybrali 40 prípadov, ktoré sme podrobili hlbšej analýze s cieľom určiť využívanie prvkov GPP. Autori článku podrobne preskúmali dokumentáciu vybranej verejnej súťaže, dostupnú na stránkach Vestníku verejného obstarávania, a na základe rozboru každého individuálneho prípadu určili, akú podobu malo konkrétnie GPP: ekologický prvok ako súčasť výberových kritérií MEAT, ekologický prvok ako súčasť technických špecifikácií a ekologický prvok ako súčasť kvalifikačných požiadaviek.

5 PRÍPADOVÁ ŠTÚDIA

Predmetné verejné obstarávanie v obci s cca dvetisíc obyvateľmi bolo vyhlásené ako podlimitná zákazka bez využitia elektronického trhoviska, zverejnením výzvy na predkladanie ponúk vo Vestníku verejného obstarávania v roku 2017 v súvislosti s predložením žiadosti o poskytnutie nenávratného finančného príspevku na realizáciu projektu s názvom „Prestavba viacúčelovej administratívnej budovy“. Výzvu na predkladanie žiadostí o poskytnutie nenávratného finančného príspevku vyhlásila Slovenská inovačná a energetická agentúra (SIEA) ako sprostredkovateľský orgán (ďalej len SO) pre Operačný program Kvalita životného prostredia. Realizácia verejného obstarávania bola outsourcovaná súkromnej firme.

Úradu pre verejné obstarávanie bol dňa 14. 12. 2020 doručený list, obsahom ktorého bol podnet SIEA na začatie konania o preskúmanie úkonov kontrolovaného po uzavretí zmluvy pri zadávaní vyššie identifikovanej zákazky. Úrad si predmetný podnet osvojil a dňa 20. 1. 2021 začal konanie o preskúmanie úkonov kontrolovaného po uzavretí zmluvy z vlastného podnetu úradu.

Podnet na kontrolu bol zo strany SIEA daný na základe kontroly Projektu zo strany Úraduvládneho auditu, ktorý požadoval korekciu 10% na základe údajného nedostatočného a nepresného zadefinovania predmetu zákazky. SIEA ako aj obec s tým záverom nesúhlasili, preto SIEA podala podnet na kontrolu (SIEA ako sprostredkovateľský riadiaci orgán vykonala kontrolu predmetného verejného obstarávania so záverom: „neboli zistené skutočnosti, ktoré by mali alebo mohli mať vplyv na výsledok verejného obstarávania“).

Dňa 12. 2. 2021 ÚVO prerušil konanie a nariadil kontrolovanému doručiť veľký rozsah dodatočnej dokumentáciu v origináli do desiatich pracovných dní odo dňa doručenia rozhodnutia (napr. vyjadrenie, z akého dôvodu kontrolovaný doplnil niektoré položky redakčnou opravou vo vestníku Verejného obstarávania, informáciu, či záujemcovia vykonali obhliadku, podrobne vyjadrenie, akým spôsobom kontrolovaný vyhodnocoval splnenie podmienky účasti, kópiu niektorých formulárov dodaných uchádzačmi, vyjadrenia, z akého dôvodu kontrolovaný nevyužil inštitút vysvetlenia ponuky, výzvu na poskytnutie súčinnosti potrebnej na uzavretie zmluvy). Obec prostredníctvom splnomocnenej osoby požadované informácie v termíne zaslala.

Dňa 16. 3. 2021 ÚVO zaslal obci výzvu na vyjadrenie sa ku skutočnostiam zisteným v konaní o preskúmanie úkonov kontrolovaného po uzavretí zmluvy. V nej uvádza ako negatívne zistenie skutočnosť, že uchádzači mali predkladať spolu so svojim návrhom zmluvy o dielo okrem iného viaceré doklady, dokladujúce ich spôsobilosť realizovať zmluvu, čo úrad považoval za zmätočné konanie v rozpore s princípom transparentnosti. Tiež tento postup považoval za neprimeraný, spôsobujúci neúmerné administratívne zaťaženie uchádzačov. Toto zistenie však nemalo nič spoločné s obsahom dožiadaných podkladov.

Obec spracovala prostredníctvom splnomocnenej osoby odpoveď, pričom je opäťovne poukázané na rektroaktívny prístup ku kontrole zo strany ÚVO. ÚVO dňa 15. 4. 2021 vydal rozhodnutie v ktorom konštatuje, že došlo k porušeniu

zákona s možným vplyvom na výsledok VO z nasledujúcich dôvodov:

- a) znemožnenie použitia Jednotného európskeho dokumentu pre verejné obstarávanie (JED);
- b) požadovanie dokumentov na základe národných predpisov, dôsledkom ktorého bola údajná diskriminácia zahraničných záujemcov.

Rozhodnutie bolo elektronicky cez e-schránku doručené v piatok na obed, čím úrad maximálne znížil počet pracovných dní na odvolanie (len 6 pracovných dní, v lehote 10 dní na odvolanie sa nachádzajú 4 voľné dni – ak by bolo doručené rozhodnutie v pondelok tak by na odvolanie bolo 8 pracovných dní).

Rozhodnutie ÚVO nie je vecne správne, pretože preukázanie podmienok prostredníctvom JEDu bolo umožnené všetkým záujemcom. Súčasťou súťažných podkladov bol aj predpripravený JED (zverejnené v profile verejného obstarávateľa). Toto rozhodnutie ÚVO spochybňuje zákonnosť stoviek – tisícov VO realizovaných pred rokom 2018, v ktorom Rada ÚVO priznala, že svojím rozhodnutím mení aplikačnú prax a že doklady vydávané podľa národnej legislatívy možno vyžadovať len od úspešného uchádzača a to až ku podpisu zmluvy o diele (keby bolo VO realizované po tomto rozhodnutí, stanovisko ÚVO by bolo korektné, ale keďže súťaž prebehla v roku 2017, došlo k retroaktívному postupu). Problémovosť rozhodnutia ÚVO v tomto prípade dokladuje aj skutočnosť, že pre obdobný prípad VO realizovaného v roku 2017 s prakticky identickými súťažnými podkladmi, vydalo ÚVO (tá istá podpísaná osoba) stanovisko, že VO prebehlo v súlade so zákonom. Celkovým výsledkom procesu bolo, že obec rekonštrukciu pre prieťahy v procese obstarávania už nemohla realizovať a peniaze získané z fondov EÚ prepadli.

6 DISKUSIA

Prípadová štúdia dokladuje riziká, ktoré vyplývajú z kontrolného procesu verejného obstarávania na Slovensku. Hlavným systémovým problémom tohto prípadu je skutočnosť, že analyzované obstarávanie bolo ex-ante (kontrola trvala niekoľko mesiacov) aj ex-post skontrolované riadiacim orgánom bez nálezu. Až tretia kontrola Úradom vládneho auditu vydala negatívne stanovisko a následne takto došlo ku štvrtej kontrole zo strany ÚVO. Jedna malá stavba bola

predmetom štyroch kontrol v časovom období štyroch rokov, dávno po plánovanom skončení investičnej akcie. A predmetom pravdepodobne účelových ex-post kontrol, ktorých cieľom sa zdá byť len nájdenie nejakého formálneho pochybenia a nie hlavne zhodnotenie výsledku. V takomto prostredí sa efektívne VO realizovať nedá.

Skutočnosť, že hlavnou prekážkou GPP je administratívny charakter procesu obstarávania a najmä jeho kontroly, potvrdili aj oslovení experti. Podľa ich vyjadrení sa obstarávateľia zdráhajú znášať riziko zapojenia kontrolných orgánov a dodatočnú prácu spojenú s používaním zložitejších kritérií hodnotenia/kvalifikácie/výkonnosti. Neochota podstupovať riziko je zrejmá a nie je neopodstatnená. Použitie nástrojov GPP v obstarávaní v akejkoľvek fáze obstarávacieho procesu zvyšuje zložitosť zmluvy a zvyšuje jej náchylnosť na námiestky súvisiace s porušením pravidiel obstarávania. Okrem toho administratívni pracovníci často nemajú dostatočné znalosti o systéme, aby mohli zadávať zákazky bez rizika potenciálnych chýb v súťažných podkladoch alebo pri hodnotení ponúk.

V tomto nepriaznivom prostredí sa zadávateľia verejných zákaziek zvyčajne rozhodujú použiť ako výberové kritérium najnižšiu cenu (v rozpore s požiadavkami európskych smerníc o verejnom obstarávaní) – tabuľka 3.

Tab. 3: »Najnižšia cena ako kritérium zadávania zákaziek (2017 – 2023) (v %)

2017	2018	2019	2020	2021	2022	2023
94,5	89,78	92,61	93,46	91,93	95,88	96,8

Zdroj: autori na základe údajov Úradu pre verejné obstarávanie

Oslovení experti uviedli viaceré vysvetlenia príliš častého používania výberového kritéria najnižšej ceny. Najreprezentatívnejšie odpovede sú nasledovné:

„*Lahšie hodnotenie: v porovnaní s kvalitatívnymi kritériami je cena ľahšie kvantifikovateľná a umožňuje rýchle hodnotenie ponúk bez potreby subjektívnych posúdení*“.

„*Lahšia dokumentácia procesu zo strany verejných obstarávateľov*“.

„*Cena je najľahšie zrozumiteľná pre úradníkov, ktorí proces kontrolujú*“.

„*Formálne je správne vedenie dokumentácie absolútou prioritou pre orgán verejného obstarávania*.“

Okrem samotného charakteru kontrolného procesu oslovení experti uviedli aj mnohé finančné (GPP zvyšuje cenu), informačné (chýbajú smernice), manažérské (nedostatok kvalifikovaných zamestnancov) a sociopolitické prekážky (nízka motivácia, korupcia) zeleného verejného obstarávania na Slovensku.

Zaujímavý je hlavne názor, že ak je projekt financovaný z fondov EÚ, nie je vhodné sa snažiť ušetriť (alokáciu treba v plnej miere využiť) a teda efektívnosť nie je motiváciou pre obstarávateľa. Jeden expert to komentoval takto:

„Hodnota za peniaze v projektoch financovaných z fondov EÚ je ilúzia, ved’ ide o peniaze, ktoré obstarávatelia dostávajú „zadarmo“, takže aký záujem majú mať príjemcovia na dosiahnutí lepšej ceny.“

Naviac, proces kontroly pri využívaní fondov EÚ je mimoriadne zložitý. Najvyšší kontrolný úrad vykonal jeden zo svojich výkonnostných auditov so zameraním na verejné obstarávanie v projektoch financovaných EÚ a jeden šokujúci záver tohto auditu predstavil predseda úradu v médiách (Kaliská, 2025:1):

„Čísla sú alarmujúce. Niektoré obce čakali na kontrolu verejného obstarávania viac ako 770 pracovných dní. To znamená tri roky. Podľa vnútorných pravidiel sa takáto kontrola mala uskutočniť do 30 dní. Po troch rokoch hodnotenia súladu so zákonom o verejnom obstarávaní sa ceny tovarov a služieb zmenili do takej miery, že mnohí z projektov odstúpili a projekty neboli realizované.“

V tejto situácii sa obstarávatelia zdráhajú používať komplexné výberové kritériá (MEAT) alebo začleňovať sofistikovanejšie ekologické prvky do súťažných podkladov. Analyzovali sme 40 vybraných prípadov GPP realizovaných na miestnej úrovni. Len v troch prípadoch sa obec rozhodla použiť ekologický aspekt ako súčasť hodnotiaceho (MEAT) vzorca. V dvoch prípadoch bol ekologickým prvkom zníženie emisií CO₂, v treťom prípade bola objektom samotná ekologická použiteľnosť produktu.

Frekvencia ekologických prvkov vo verejnej súťaži bola nasledovná - realizácia opatrení znižujúcich množstvo vyprodukovaného odpadu: 11; použitie recyklovaných materiálov: 10; Ekolabel dodávateľa: 6; a existencia systému environmentálneho manažmentu u dodávateľa: 4 (v ďalších prípadoch evidovaných ako GPP sme „zelený prvok nenašli“). Naše zistenia naznačujú, že z analyzovaných 40 prípadov až šesť bolo vykázaných neopodstatnene.

ZÁVER

Naša štúdia dokazuje, že GPP na Slovensku nefunguje dobre, čo priamo dokladujeme podrobnejšou analýzou situácie na miestnej úrovni. Z viacerých dôvodov, ktoré vedú k takejto situácií, text naznačuje, že byrokratická administratívna kultúra, ktorá sa vyhýba riziku, predstavuje pravdepodobne najkritickejšiu prekážku rozvoja GPP. Takáto kultúra je do určitej miery „vynútená“/ katalyzovaná viacerými problematickými aspektmi procesu verejného obstarávania na Slovensku, hlavne jeho kontroly.

Z daného dôvodu nás článok špecificky dokladuje a zdôrazňuje problém príliš zložitých kontrolných procesov vo verejnom obstarávaní. Len pripomíname, že v tejto fáze sa text nezaoberá dôvodmi, prečo je kontrola verejného obstarávania na Slovensku taká problematická – tento rozmer považujeme za výzvu pre budúci výskum (je to len obmedzená kvalifikácia kontrolných orgánov a ich zamestnancov, alebo skôr úmyselná manipulácia s verejnými obstarávaniami?).

Výsledky, ktoré sme získali sú v plnom súlade s teoretickými predpokladmi teórie byrokracie, ako teoretického rámca tejto štúdie. Táto teória poskytuje vysvetlenia, relevantné pre skúmaný problém, ktoré sa aj našim výskumom potvrdili. Hlavným limitom obmedzujúcim využívanie GPP, ako uvádzajú všetci odborníci, bol faktor „byrokratickej bezpečnosti“. Primárnym pravidlom pre verejných činiteľov zodpovedných za obstarávanie je nakupovať „bezpečným spôsobom a bez oneskorení“. Toto pravidlo akceptujú všetky relevantné publikácie o verejnej volbe ako klúčovú črtu byrokracie a byrokratického systému verejného obstarávania (Wilson, 1989). Špecifickým zistením je fakt, že „standardná“ byrokratická opatrnosť je v podmienkach Slovenska „katalyzovaná“ ďalšími inštitucionálnymi faktormi, predovšetkým viac ako problematickým fungovaním kontroly verejného obstarávania z fondov EÚ. V tomto smere by sa dalo hovoriť o „vynútenej“ byrokratickej opatrnosti (averzii k riziku).

Výrazné zlepšenie situácie v krátkodobom pohľade zrejme nie je možné očakávať, pretože je nutná zmena myslenia a nie len zmena mechanizmov/ právneho rámca. Dnes je verejné obstarávanie na Slovensku dominantne byrokratickým procesom, s cieľom „do bodky“ dodržať všetky komplikované predpisy. Bude niekedy v budúcnosti procesom manažérskym s hlavným cieľom „hodnota za

peniaze“? Podarí sa prekonať „historicky rigidný“ prístup k chápaniu verejného obstarávania generovaný historickou stopou minulosti („path-dependence“)? Momentálne na tieto kľúčové otázky nevieme odpovedať.

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