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Bifurcation and Stratification in Post-Socialist Welfare Regimes

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Abstract¹

The essay assesses the work of Júlia Szalai on the concept of the bifurcated welfare state as a contribution to the debate on welfare regimes in Central and Eastern Europe. It locates her work in the context of the debate around Esping-Andersen's ideal types of welfare state regimes and sees the bifurcated welfare state as offering a means of understanding the key features of hybrid welfare states in East Central Europe. The essay then examines evidence in support of the concept and explores possible ways in which the idea may contribute to the research agenda on welfare regimes.

Keywords: Welfare state, Welfare regime, Bifurcation, Stratification, Dualisation.

¹ The ideas explored in this essay are the outcome of discussions with Júlia Szalai in recent years. I am also grateful for the comments of Dorottya Szikra and two anonymous reviewers on an earlier version of this essay, although the particular interpretations here are mine and cannot necessarily be attributed to Júlia or the reviewers, and any errors of interpretation or fact are mine alone.

In the course of her distinguished career, Júlia Szalai has made a number of significant contributions to developing a sociological understanding of a wide range of social changes since the 1980s in Hungary and the countries of Central and Eastern Europe (CEE), including entrepreneurs in post-socialist Hungary, and issues of social rights, social welfare, education, gender, ethnicity and poverty. Underlying her analyses of these social issues has been an understanding of a deepening social division at the basis of societies in the CEE region in emerging welfare regimes. As proposed by Gøsta Esping-Andersen (1990: 2), ‘to talk of “a regime” is to denote the fact that in the relation between state and economy a complex of legal and organisational features are systematically interwoven’; and although each society comprises a unique set of characteristics in detail, a way to understand their systematic character is to develop typologies of the key features whose combination helps us to understand the way peoples’ livelihoods and life chances are shaped.

The particular contribution of Júlia Szalai to this endeavour has been to explore the tendency towards what she has described as a bifurcated welfare state in CEE countries, whereby those in more influential positions in society are successful in gaining an advantage or defending existing privileges in the provision of welfare, leading to the creation of two distinct segments of society with very different and unequal rights and entitlement to shares in the distribution of welfare. Originating in the work of scholars in the US to describe inequalities in welfare provision there, Szalai has adapted and developed the concept to provide an analysis of key features of an emerging systematic complex of arrangements, or welfare state regimes, which typify the provision of welfare in Hungary and other CEE countries.

This essay proceeds by first discussing welfare provision in CEE countries in the context of the welfare regime literature, then examining Júlia Szalai’s ideas on the bifurcated welfare state and evidence for the latter in more detail, and finally by assessing her work as a contribution to theories of welfare state regimes.

1. The Welfare Regime Debate and Central and Eastern Europe

Since the early 1990s a growing body of scholarly work has sought to discuss the transformation of ‘state socialist’ welfare arrangements in Central and Eastern Europe (CEE) in the context of their wider transition to market economies. Key questions concern the extent to which governments are involved in the provision of public welfare or the regulation of private and market-based welfare arrangements; how governments ‘redistribute income, either through insurance schemes that mitigate risk or through spending on basic social services that are of particular significance to the poor’ (Haggard and Kaufman, 2008: 3); and what consequences such choices have for the extent and character of inequality, social exclusion and poverty in a given society.

Research on welfare in the region has included studies of the politics of social policy (Cook, 2007; Cox, 2007; Cox and Gallai, 2012; Offe, 1993; Orenstein, 2008; Potůček, 2008), changing pensions policies (Fultz, 2002; Orenstein, 2008; Szalai, 2004), the influence of international organisations on welfare policies in the region (Deacon and Hulse 1997; Orenstein and Haas 2005), welfare assistance (Braithwaite et al., 2000; Nelson, 2010; Ringold and Kasek, 2007), and empirical studies of the

consequences of changing welfare provision for the poverty, income inequality and security of different social groups (Dudwick et al., 2005; EBRD, 2011; Emigh and Szelényi, 2001; Smith et al., 2008; Swain, 2011; Szalai, 2006). Further studies have focused on the forces shaping the emergence of post-socialist welfare provision in terms of long-term historical legacies (Cerami and Vanhuysee, 2009; Ingot, 2008) and the immediate political needs of post-socialist ruling political elites in managing the high costs of the economic transition, reducing welfare spending and dividing and pacifying competing social groups (Vanhuyse, 2006; Bohle and Greskovits, 2012).

A further significant theme in the literature on the new social welfare arrangements in CEE countries concerns the question of how they relate to the wider literature on theories of welfare state regimes or welfare regimes, including whether they represent a new post-socialist type of welfare state regime or a hybrid type (or types), combining aspects of existing types that have been developed to understand societies outside the CEE region.

In recent research on welfare in CEE countries in terms of welfare regimes a range of arguments has been put forward about whether post-socialist countries in general approximate any of the types identified in the existing literature, whether they typically combine elements of more than one type, or whether a new post-socialist welfare regime is emerging (Fenger, 2007; Ferge, 2008; Hay and Wincott, 2012). Some scholars have suggested that different new post-socialist regime types can be identified; for example, separately for Russia, the Baltic countries, Central Europe, and South-East Europe (Bohle and Greskovits, 2012; Myant and Drahokoupil, 2011). For Cerami (2006), the provision of social welfare in East European countries combines characteristics of the pre-communist Bismarckian welfare state, based on social insurance schemes that compensate employees for loss of income in adverse social circumstances, the more universalistic system of communist regimes, and post-communist market-based elements. Similar views stressing the hybrid nature of CEE welfare arrangements are proposed, for example, in Cerami and Vanhuyse (eds.) (2009), where the newly emerging post-communist arrangements are described as combining different elements typical of different mature welfare states elsewhere in Europe and beyond. Also, for Ingot (2008) CEE countries have developed some heterogeneous tendencies, but all from a common basis in Bismarckian systems that were then adapted at various times, both under communist rule and in the post-communist period, to cope with new emergencies in welfare provision. Ingot suggested CEE welfare states may be seen as 'emergency' welfare states, referring to their provision of welfare according to cycles of (economic and political) crises, rather than modes and sources of redistribution. Similarly, Szikra and Tomka (2009) also stressed the volatility of CEE welfare states that has resulted from frequent (paradigmatic) reforms following changes of government. Recognising this diversity, Kovács et al. (2017: 194) in a recent review of the literature suggested there is now a consensus among scholars concerning the hybrid nature of CEE welfare states.

However, underlying the emerging consensus on hybridity a major methodological theme running through this literature (as with the welfare regime literature more widely) has been the issue of identifying the most appropriate methodology for identifying different types of welfare state regime. As noted by Aspalter (2012), one approach has been to construct ideal types of the kind originally

proposed by Max Weber. Here the strategy of enquiry, based on deductive reasoning, is to identify key features of an ideal type to use as a yardstick in comparison with more complex reality and to produce hypotheses for empirical analysis. This may be contrasted with real types that are constructed through a process of inductive reasoning to reflect the patterns in which a range of empirical characteristics cluster together to form recognisable regularly occurring types.

Some of the most comprehensive CEE welfare state regime studies have adopted a real typical analysis. Pioneering work of this kind includes that by Fenger (2007), who used a combination of macro-economic, socio-economic and trust indicators to delineate three different types of CEE welfare state, comprising a former Soviet type (including both Russia and the Baltic countries), a post-communist European type (including the Czech Republic, Hungary, Poland and Slovakia, as well as Bulgaria and Croatia), and a developing welfare state type (including Romania, Moldova and Georgia).

A more recent example is provided by Kati Kuitto (2016) who carried out a comparative statistical analysis of European countries, including ten CEE EU-member countries,² across three dimensions of welfare provision: first, in terms of the organisational principles of welfare provision (that is, whether welfare provision was financed mainly from social contributions collected from employers and employees along the lines of a Bismarckian approach, or whether welfare was financed mainly from tax revenue along Beveridgean lines); second, welfare policy emphasis (whether welfare support was targeted towards cash spending on specific categories such as old age pensions and sickness benefits, or towards social services); and third, decommodifying potential (the degree of generosity of support that effectively compensates for loss of income from labour or other markets).

Using data about the ten countries for the period 2005-2007, Kuitto found ‘the results negate the emergence of a unitary Central and Eastern European model of welfare and, instead, verify the emergence of differing hybrid models of welfare across the post-communist countries’ (Kuitto, 2016: 162-63). All the CEE countries relied on social contributions from employers and employees to finance welfare, with the Czech Republic, Estonia, Slovakia and Slovenia relying on them particularly strongly. They all approximated the conservative corporatist type by emphasising spending on old age benefits and health care and awarding low importance to social services. In terms of decommodification, they all provided working age unemployment and sickness benefits, with the Czech Republic, Estonia, Latvia and Slovenia doing so more generously than the other countries of the region (Kuitto, 2016: 162-64). Furthermore, outside the usual social security focus of the welfare regime typologies, ‘social services play only a marginal role in the financial commitment of governments [...] [and] to a great extent are either transposed to market-based solutions or back to responsibilities of families’. This has occurred alongside ‘liberal tendencies of privatisation’ including the ‘increasing individualization of social risks’ in some fields of welfare such as social care (Kuitto, 2016: 176).

Kuitto suggests her findings support ‘views characterizing the CEE welfare states as hybrids. [...] Despite the comparably low levels of welfare effort and some

² Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia.

privatization of social security, the emerging CEE welfare states are in many ways completely distinct from [...] the ideal-typical liberal welfare model. [...] Instead, the spectrum of welfare policy arrangements [...] ranges from conservative corporatist Bismarckian to social democratic universalistic elements, with varying degrees and mixtures of each' (Kuitto, 2016: 177).

While Kuitto's research drew on data for the years immediately before the financial crisis of 2008, she notes that the impact of the crisis, EU fiscal constraints and subsequent changes in social policy in some countries in the region have affected levels of social security benefits and the amount of funding available for welfare more generally. This has made an increasing number of people more vulnerable in terms of their social security status and widened the gap between those who are relatively secure and those who are not, with implications for the overall character of welfare regimes in CEE countries. As Kuitto notes, 'The imprints of the welfare policy patterns as identified in this study therefore point to a high risk of dualization of welfare in the CEE countries, in the sense that the few labor market insiders are provided with relatively generous welfare benefits, while an increasing number of labor market outsiders are left with low levels of social assistance (Kuitto, 2016: 183-84).

A significant achievement of this growing body of research that employs a 'real typical' methodology has been the creation of an increasingly detailed and nuanced picture of the range of welfare provision arrangements in the CEE region. In its detail and comprehensiveness, Kuitto's study demonstrates the benefits of a multidimensional real typical approach in constructing regime types, taking a wide range of characteristics into account and examining how they cluster together to form regular types. However, such work also loses some of the clarity that an ideal typical approach can offer through suggesting what the key defining characteristics are that distinguish different regimes from each other in comparative analysis, and which help with formulating hypotheses to explain the occurrence and development of particular welfare regimes. Such are the advantages of an ideal typical approach, as pioneered by Gøsta Esping-Andersen (1990).

Esping-Andersen's work was important inspiration for research on welfare regimes in general. His ideal types of welfare state regime, initially proposed for the 'old' OECD member countries, were based on how the state in some way acted as a corrective for the worst effects of market capitalism on peoples' livelihoods by introducing a degree of 'decommodification' (Esping-Andersen, 1990: 37). He proposed the three types of state: liberal, where the state leaves families and individuals to secure their welfare and subsistence through the market and only provides for residual narrowly targeted needs; conservative/corporatist, where the state organises or regulates insurance against loss of income from work, aimed at male workers as providers for their families; and social democratic, based on universalistic principles and providing income compensation in response to needs, irrespective of past employment history (Esping-Andersen, 1990: 26-27).³

³ Subsequent modifications have been introduced by others to take account of a wider range of countries (Ferrera, 1996; Leibfried, 1992); including gender differences (Anttonen and Sipilä, 1992; Sainsbury, 1996), to identify quantitative indicators and measures of the extent to which societies cluster into one or

The two key variables in the formulation of Esping-Andersen's ideal types were decommodification and social stratification, with decommodification being the main defining variable. Each different regime provides a different level of decommodification mainly through the degree of generosity of its social insurance benefits (measured by his decommodification index), either to maintain or reduce the degree to which citizens are subject to market forces in securing their welfare. At the same time, the different arrangements for the provision of social welfare can be examined both as the outcome of class relations and as an influence on patterns of social stratification. Different complexes of arrangements, or welfare regimes, could be seen as the outcomes of different class alliances, or more accurately, as the result of the interplay of class mobilisations, coalitions between classes, and state institutions for the adoption of particular policies (Esping-Andersen, 1990: 3-4, 58). Bearing in mind the different advantages Weberian scholars have argued that an ideal typical analysis provides for comparative research and for understanding the key social processes and relations that may explain the formation of different regimes, the delineation of ideal types of the kind proposed by Esping-Andersen can make an important contribution to understanding the formation of CEE welfare regimes. This does not exclude the idea that CEE welfare regimes may be hybrids, but that their hybrid nature can be best understood as a combination of elements of different more abstract ideal types, rather than resulting from statistical clustering of a wider range of data. In the context of the literature on CEE welfare states, the work of Júlia Szalai on the bifurcated welfare state can be seen as an important contribution to the ideal typical analysis.

2. The Work of Júlia Szalai

The conceptual framework for the development of Szalai's ideas draws on a range of sociological thinkers, including especially Max Weber and T. H. Marshall.

In her sociological research Szalai has drawn on the interpretive sociology of Max Weber (Shils and Finch, 1949), including his methodological writings that call for explanations that both uncover the economic and political causes of social patterns and offer explanations 'at the level of meaning', that draw on peoples' own testimonies to show how they understood the ways of life they were leading; and in his proposals that research should seek explanations through the construction of ideal types to explore the relations between multiple variables that are part of the overall explanations of particular social patterns. There is also a clear Weberian influence in her work on contemporary post-socialist societies as the outcomes of complex patterns of social differentiation involving the interconnected nature of class, gender, ethnic and cultural differences that can be revealed by a combination of statistical and textual analyses and qualitative research based on interviews and observation.

Szalai draws on the ideas of Marshall (1964), in particular on the evolution of civil, political and social rights, and their further development by Will Kymlicka (1995). From Marshall, Szalai takes the idea that the extension of different kinds of rights across a population was a gradual process whereby social rights for all social

another type (Kangas, 1994; Arts and Gelissen, 2002); and to incorporate additional dimensions into the methodology (Bonoli, 1997; Castles, 2009).

groups were obtained through a political struggle that built on existing civil and political rights, and by implication, therefore, cannot be imposed 'top-down'. To this, a further key idea in understanding contemporary societies is the way rights can be extended in situations of greater cultural heterogeneity, for example, to ethnic and national minorities. In examining CEE societies, and particularly Hungary from the early 1990s, Szalai has sought to understand the factors enabling or constraining the extension of social rights in conditions where economic and political transition have extended civil and political rights across the population, not only in terms of class and gender, but also including ethnicity, and especially in the Hungarian context, the Roma minority (Szalai, 2013: 3-4).

These themes are evident throughout Szalai's work, but in what follows I will focus on their importance in her work on the evolution of distinct patterns of welfare provision in Hungary and other CEE societies. For Szalai, in the early 1990s in Hungary there was consensus among a wide range of different political actors in favour of dismantling the previous overweening power of the state and in creating institutions to safeguard civil and political freedoms, and making major reforms in the provision of social security and welfare (Szalai, 2012: 285). In seeking social policy reforms there was wide agreement that the imposed universalism of the communist regime had in fact 'brought about massive social injustice by routinely channelling substantial funds to the relatively prosperous strata of society', and thus wasting resources by providing funding where it was not really needed. Therefore, the aim was to create a 'new system that would not only become more targeted but also more just' (Szalai, 2012: 286). However, this was based on the assumption that economic transition would enable the development of an economy guided by principles of a social market, whereas the actual outcome was reforms based more on neo-liberal economic ideas.

In the initial context of the post-transition recession and more general pressures of globalisation and competition from international companies, domestic economic policy was geared to creating a stable capital market and giving support to local employers. For Szalai, however, 'it is above all in the realm of employment that the state's presence in welfare has been proclaimed [...]. Under these conditions it has again fallen to the state, in its welfare role, to meet the need for preventing and protecting against the risk of poverty' (Szalai, 2012: 291). As a result, the main focus of social policy was in supporting pensions and unemployment benefit for those who through their employment had made contributions to the system. Under difficult economic circumstances and the adoption of austerity policies, the main area where governments could make cuts without serious political opposition was social assistance.

Szalai has developed her ideas on social welfare and the bifurcated welfare state in a series of conference papers, books and articles over a number of years since the 1990s.⁴ In some versions the argument has been confined to the provision of welfare in Hungary, although increasingly the general argument has been applied to post-socialist societies more widely. Her argument has been that a tendency towards the

⁴ The discussion here draws on two of the most developed and succinct presentations of Szalai's ideas in English (Szalai, 2012; 2013). However, the most detailed expression of her views is included in her book in Hungarian (Szalai, 2007). See also: Szalai (1997) and Szalai (2006).

development of a bifurcated welfare state existed in the countries of Eastern Europe, whereby those in more influential positions in society have gained advantage or have defended existing privileges in the provision of welfare, leading to the creation of two distinct segments of society with very different and unequal rights and entitlements to sharing the distribution of welfare.

For Szalai, use of the state budget to maintain insurance-based social security for the employed and those with stable employment histories, along with selective provision of social assistance to those in need who do not qualify for social security, whether intended or not, has had a significant impact on the overall character of the welfare state in Hungary. The creation of such a dual welfare structure was a betrayal of the liberal vision of welfare reform of the early 1990s, and may actually be seen as the main defining characteristic of the emerging welfare state, thus bringing about a bifurcated welfare state.

The concept of a bifurcated welfare system has its origins in research on welfare provision in the US (Lieberman, 2002; Schram, 2010). However, a major contribution to the literature by Szalai has been to adapt the concept to what she sees as the emergence of a stable situation in CEE, where movement between the two sectors of the bifurcated welfare state has become increasingly difficult. The social policy adopted by successive governments in Hungary has accomplished ‘the canalization of a significant section of the affected social groups into a sealed subdivision of welfare provisions’, while for more fortunate sections of the population, ‘social security benefits have provided protection against falling into poverty’. And since ‘contributions have hardly been able to keep pace with the needs that these shifts imply [...] it is the central state that has been left to bridge this gap’. Moreover, ‘despite initial expectations of creating a separation between state and civil society, the state has remained an agent in defining the content of social citizenship’ (Szalai, 2012: 292-93). Thus, the outcome was ‘the evolution of a bifurcated welfare system with hermetically separated structures of provisions for the well-integrated and the marginalized groups of society’, which is not only a departure from Marshall’s ideas on social citizenship and the evolution of social rights, but ‘a long-term departure from the western European path’ (Szalai, 2012: 299-300).⁵

The pursuit of the policies behind the formation of the bifurcated welfare state have to be understood, according to Szalai, in the context of the power relations and conflicts of interest in which those whose economic positions afford them more influence over government are able to successfully press their claims in terms of social welfare. These include claims for compensation for lost income or job stability as a result of economic restructuring and recession, along with claims by groups in stable employment or with a history of it that they are more deserving of support as a result of the contributions they have made, and sometimes even their more responsible and respectable lifestyles. Drawing on the ideas of Habermas (1994), she describes these claims as ‘recognition struggles’ (Szalai, 2003). Such claims match the preconceptions of those in power regarding the need for political stability and the preservation of a workforce that is either participating in, or at least is available for the needs of business. Thus, for Szalai, ‘in addition to the pressures that [result from] the extra

⁵ For a detailed discussion of the departure of Hungary from the European welfare model, see: Scharle and Szikra (2015).

burdens and risks of marketisation, there are also important cultural and attitude factors at play when claiming the state's long-term protection. [...] Widely varying groups consider that the time has come for the state to compensate them for their historical grievances and their decades of "lagging behind", to give them open assistance for the advancement they "deserve" (Szalai, 2013: 7).

By putting the development of the bifurcated welfare state in the context of such conflicts of interest and political struggles, Szalai's work marks a welcome return to one of the key ideas in Esping-Andersen's original analysis: 'to identify the causes behind welfare state diversity' in the prevailing relations between classes and other groups in society. For Esping-Andersen, his three welfare regimes were the 'outcomes of distinct types of cross-class coalitions. Different patterns of social stratification were historically the midwives of different welfare state conceptions' (Esping-Andersen, 2015: 124-125). Esping-Andersen's research mainly focused on social insurance benefits and their generosity (especially the decommodification index). This is a major difference between his and Szalai's work. Szalai's in-depth research in the 1990s and 2000s mainly focused on social assistance. In this way she sought to examine how those who fail to qualify for social insurance benefits fared.

The abovementioned canalisation of the less fortunate into a sealed subdivision of welfare provision was effected, according to Szalai, by the devolution of social assistance provisions to local government, and specifically 'by calling thousands of new offices into being, with tens of thousands of decent middle-class jobs [which] [...] created a refuge for many of those made vulnerable to dismissals during the process of economic restructuring'. This had a number of implications, including the provision 'of an institutional background to enable the non-poor majority to deal with poverty as a minority problem, separate from its own "normal" affairs' (Szalai, 2012: 294), and to do so in a fragmented way where different local government bodies are required to provide assistance to those defined as being in need according to criteria that may differ from one locality to another, to be implemented by a variety of low-level officials who will bring their own judgements into play concerning who is in need through no fault of their own and who is undeserving because they do not qualify according to the criteria of 'acceptable reasons' for being in need: 'In this new order of localized welfare, the keyword is distinction, which [...] is the borderline between accepted and unaccepted forms of need. However, due to the lack of any universal norms for the assessment of need, the new decentralized arrangements leave this assessment process to the discretion of local welfare providers who establish their criteria with exclusive reference to the community in which they operate'. This, in turn, leads to the 'reinvention of the centuries-old idea of deservingness' and to the creation of a category of welfare recipients who are seen as the deserving poor (Szalai, 2012: 295).

Moreover, since such judgements are often made by ethnic Hungarian officials in relation to Roma minority welfare applicants who have no stable employment history, the system becomes not only class-biased but ethnically biased as well. Since at the time of the system change the Roma were predominantly employed in 'unskilled positions in the least developed segments of industry and agriculture', they became 'the first victims of marketisation: mass unemployment suddenly turned to the general experience of an entire minority. The majority meanwhile, did not see anything

unusual in this: cutting off Roma communities in their totality from access to employment has gradually developed into a self-justifying argument for “minoritization” – that is, for creating “other” schemes of welfare for people who are not “us” (Szalai, 2012: 10-11).

In developing her concept of the bifurcated welfare state, Szalai has made a significant new development in the debate on welfare regimes, and in particular, has offered a new ideal typical approach in the tradition of Esping-Andersen as a contrast and a complement to the real typical approaches that have been dominant in the field. Moreover, in her own writing on Hungary she has provided evidence using statistics and interviews to illustrate her ideas. The next step, however, in line with Weber’s methodology, would be to hold up this ideal type against a wider body of evidence to examine how far it is able to explain the emerging character of welfare provision in CEE countries.

In the following section I will examine some evidence from earlier studies and tentatively assess how far the bifurcated welfare state concept explains the emerging situation in CEE countries. Of course, the sources of the social exclusion of particular sections of society, and hence the basis for bifurcation, can be seen in a number of different areas of social policy (Kovács et al., 2017: 202). However, following Szalai, the focus here will be on examining the effects of how social assistance is provided, how far current welfare systems lead to the creation of two distinct segments of society with different standards of living and different life chances, and how far access to assistance is being restricted to people who are regarded by those responsible for providing assistance as deserving of it.

3. Assessing the Evidence: The Example of Social Assistance

A key feature of the concept of the bifurcated welfare state is the use by governments of devolved forms of social assistance, not as part of universal welfare provision through income maintenance for all those in need in the population, but as a selective means of providing minimal assistance which in practice, if not by design, is only available to some of the poor.

Studies of social assistance in CEE countries from the early 1990s until the time of EU accession found that it only reached small sections of the population and involved low levels of funding (Ringold et al., 2007). Such findings were confirmed through analysis of more detailed data from the SaMip database of social assistance benefit levels by Kenneth Nelson (2010). To examine the question ‘whether social assistance is offered at levels that enable households to leave poverty’, and comparing the Czech Republic, Estonia, Hungary, Poland, Slovakia and Slovenia (and Spain) and with all the old EU member countries together, Nelson calculated social assistance adequacy rates which compare benefits to median incomes for the year 2000. He found that ‘adequacy rates among the European transition countries [...] are below the adequacy rates for the old EU democracies [and] especially in Estonia and Hungary, social assistance is far from providing adequate protection against poverty’ (Nelson, 2010: 373). Moreover, the new member countries of ECE were increasingly falling behind the older EU members in terms of levels of benefits. In 1995, benefit levels in the ‘European transition countries’ were on average 52 per cent of corresponding

benefits in the old EU countries, and this fell to 42 per cent in 2005 (Nelson, 2010: 375).

According to another study by Silvia Avram that focused on the post-accession period, general problems were still inherent in social assistance programmes concerning attempts to target benefits to those in need. To explore in more detail the outcomes of social assistance programmes in CEE, Avram analysed micro-data from the EU-SILC survey for incomes between 2004 and 2010 for eight countries (the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia). Among her findings were that social assistance programmes in the region were rather 'wasteful' in the sense that the share of total social assistance transfers contributing to poverty reduction was 'well below half' in the worst cases of Hungary and Latvia, and 'even in the most efficient countries (Czech Republic and Estonia) the share of well-targeted spending was below 75 per cent' (Avram, 2016: 436). More generally, her conclusion was that 'variation in programme performance notwithstanding, social assistance programmes are rather ineffectual and inefficient in dealing with poverty in all eight CEE countries. [...] The low poverty reduction achieved [...] is probably unsurprising given the (very) low level of benefits and small programme expenditure typical of this region' (Avram, 2016: 438).

Further important insights into how social assistance is administered and who it reaches can be found in a wider ranging study by Serena Romano (2014) that draws on a literature review and documentary evidence as well as statistical data to explore the social construction of poverty in CEE countries. According to Romano, policies and governmental attitudes to the provision of welfare in ECE countries since 1989 have undergone some variation, both over time and between different countries. She suggests a number of factors have influenced these variations in policy making between maintaining selectivity and adopting more universalistic minimum income schemes.

During the 1990s, under the influence of international agencies such as the World Bank and the EU, governments increasingly adopted selectivity in social assistance and family policy, providing a last resort safety net for the poorest only (Romano, 2014: 130). This tendency towards selectivity began to be reversed after the adoption by the EU of the Lisbon Strategy which encouraged the adoption of a more universalistic approach as part of a social inclusion anti-poverty agenda that, for example, favoured minimum income schemes. However, since the EU exerted only the 'soft pressure' of encouragement rather than enacting any firmer directives or incentives, in practice the new policy trend was balanced, in some countries more than others, by counter-influences such as economic problems and pressure from lobbies that resisted such policy changes, such as the elderly or the middle class.

Consequently, during the 2000s and in particular the years up to 2008 covered in detail in the Eurostat and EU-SILC data analysed by Romano, there was significant variation between CEE countries in the extent to which they attempted to adopt the EU agenda or continued to follow a selectivity agenda that supported a dualistic welfare system. On the one hand, 'certain countries (such as Hungary and Poland) tried to reform the former social protection system but they found themselves unable to alter the distributive balance between different categories of welfare claimants and the remnants of the previous passive and stigmatising orientation of social assistance

measures were hard to eliminate. Others succeeded in the transposition of EU social inclusion objectives (Czech Republic and Slovenia)' (Romano, 2014: 171).

Since the financial crisis of 2008, the situation has become increasingly complex. On the one hand, according to Romano, the influence of the EU social inclusion outlook has continued to have some effect: 'with the exception of Hungary and Slovakia, most of the post-communist countries in our studies at present have a far more inclusive approach to social protection than in the past twenty years' (Romano 2014: 203).⁶ On the other hand, with the 2008 crisis leading to the adoption of austerity measures in nearly all countries of the region, one of the main strategies has been restricting eligibility for social assistance 'to increase incentives to work' and constructing 'stricter boundaries between different categories of welfare claimants, that is, between deserving and non-deserving poor. A new, moralising shift is observable almost everywhere in the post-communist countries analysed in this study. The introduction of hard forms of workfare mechanisms in CEE countries, however, is of significant importance as it could easily restore the past attitude towards the unemployed parasite predominant under the communist rule' (Romano 2014: 202-03). Similarly, Aczel et al. (2014: 53) noted in Hungary and Poland that 'social policy vocabulary often describes benefit recipients as "immature" and "passive", delegitimizing the very existence [of social assistance programmes]'.

At the time of writing, evidence was mixed concerning whether a clear process of bifurcation was occurring in welfare provision, but there was evidence that in general the governments of the CEE countries had followed the World Bank advice to devolve the provision of social assistance to the local level, resulting 'in a fragmented world of many different social assistance models, different practices and different mechanisms of implementation'. Furthermore, 'the emergence of several social assistance systems [...] has been coupled with the diffusion of several different "micro" practices implemented every day by local social workers. The outcome has been that, 'even if most CEE countries have introduced guaranteed minimum income benefits as subjective rights, the actual entitlement of families and individuals to receive the benefit [sic] is more and more dependent on controlling mechanisms on [sic] the "behaviour" of the claimant [...] for example, his/her attitude towards employment, parenting, social integration and (more recently) community work' (Romano, 2014: 210-211). Thus, in some countries 'deservingness' may be constructed not only around long-term unemployment, but also around individual family behaviour; for example, when people are seen as deliberately planning to have children in order to qualify for different kinds of payments. This coincides with Avram's comment above that 'programme eligibility rules [...] often [...] tak[e] into account household composition, capacity to work and/or accumulated assets' and are based on 'local street level discretion' (Avram, 2016: 430). For Hungary, Szikra (2014: 496) notes 'the able-bodied poor have been increasingly punished for their own situation: homelessness became criminalised and social assistance withdrawn for an increasing share of long-term unemployed'.

⁶ For an outline of the social policy changes in Hungary specifically, see Scharle and Szikra (2015). The former authors note for Hungary that income surveys from 2011 show 'a substantial decline in income security [...] of the lower classes as a result of tightening access' to benefits (2015: 308).

A further question concerning identity is the extent to which in practice ethnic identity, and therefore in many CEE countries, Roma identity, is targeted as an undeserving category. For Romano, while on the basis of cross-country comparative data on poverty and social assistance ethnicity is invisible, ‘the ethnic dimension in the social construction of poverty constitutes a silent variable, something that cannot be seen but that is widely recognisable in discourses, legislation and in conditionalities designed to exclude those who do not comply with societal norms. [...] [T]he boundaries defining the Roma as an undeserving category of poor are quite evident’ (Romano, 2014: 218). For Hungary, Szikra (2014: 496) notes that ‘poverty has an increasingly “ethnic” face’, with the Roma as a proportion of all poor people increasing from 20 per cent in 2007 to a third in 2012.

Overall, as noted above by Kuitto (2016: 184) post-2008 developments are potentially leading to a ‘high risk of dualization of welfare in the CEE countries’. Moreover, to the extent that a dual system of provision is emerging based on different treatment for the deserving and non-deserving poor, it can be understood very much in terms of ‘the construction of class interests’ as suggested by both Esping-Andersen and Szalai. According to Romano (2014: 213), ‘in most of the countries analysed, the pressure exerted by the middle class to transform or preserve a given pattern of redistribution played a crucial role during the transition years’. However, the ongoing process of exclusion leading to dualisation or bifurcation extends beyond class interests in that those interests that successfully lobby for a particular pattern of redistribution may extend in some countries to questions of identity and to groups defined, for example, in terms of age and family status: ‘those who are considered “part of us” are more likely to receive more than those who are “not us”. In the CEE countries “us” has assumed a wide range of configurations: elderly people in post-1989 Poland, families with children in Estonia, middle classes in Hungary and (to a lesser degree) in Poland and Slovakia’ (Romano, 2014: 215).

To sum up, the evidence offers some support for the conclusions that across the CEE region social assistance benefits are lower than would be required to provide for income maintenance along universalistic lines and to alleviate poverty; that to varying degrees from country to country social assistance is made available selectively according to who is judged to be deserving of support; and that following the devolution of social assistance to local governments and the contracting out of some services to companies, NGOs and church organisations, there has been an increase in inconsistency, arbitrariness and informality in deciding who receives support and in what quantities.

All these tendencies suggest the potential consolidation of a stable bifurcated welfare state to varying degrees across CEE countries and especially in Hungary and Slovakia. Further research is required to reach firmer conclusions, but if economic conditions after the 2008 crisis can be seen as contributing to the dualising, informalising trends in the provision of social assistance, then it seems likely that the continuing retrenchment and austerity of recent years may have pushed the situation further towards a bifurcated system.

4. Theoretical Implications

If, as suggested above, there has been a consolidation of bifurcation in the provision of welfare in CEE countries, the question arises whether this implies the emergence of a systematically interwoven complex of features that Esping-Andersen suggested was the defining characteristic of a welfare regime. The strength of Szalai's arguments concerning the bifurcated welfare state and the wealth of evidence in the work of Romano and others provides significant support for the claim to the emergence of a systematically interwoven complex, and recognition of this as a key ideal-typical feature of welfare regimes. This could offer an important focus for further thinking on the character of welfare states in CEE countries. Particularly significant is the argument that a bifurcated system entails a qualitative change in social stratification so that poor welfare recipients without stable employment histories are not only offered inferior types of support, but that they are trapped in a subordinate and insecure social category with little or no prospect of exit from it. It may well be that such bifurcation of welfare states is more present in the CEE countries than in the 'West', and that CEE welfare states are more inclined to establish such systems. Reasons for this might include, for example, the long history of neglect of unemployment benefit and social assistance systems, and the long history of Bismarckian, status-conserving welfare arrangements in CEE countries. A third reason, which is also part of Szalai's argument, is the influence of the anti-Roma sentiments of large parts of the population and (even more importantly) the political elites.

However, if this line of reasoning is pursued, a further question must then be addressed: should a bifurcated welfare state be seen as an additional ideal type, or be better conceived as a sub-type within the three or more 'main' types proposed by Esping-Andersen or others in the debate that ensued after his original proposals? The way the term 'bifurcation' was used initially in much of the literature on welfare provision in the US suggested it was a descriptive feature of the system rather than a principal defining characteristic. This would suggest that if related to ideal types of welfare regimes, the bifurcated welfare state could be seen as a feature of some liberal welfare regimes. However, in adopting and adapting the concept of bifurcation Szalai makes two further, original points: first, that the bifurcated welfare state can be seen as a systematic regime-type complex rather than simply a feature of the existing system; and second, that the existence of a bifurcated system can be observed not only within the liberal type of welfare regime, but also in CEE countries whose welfare systems originated partly in the Bismarckian conservative/corporatist type of regime.

Seeing the bifurcated welfare state as a stable element within one or other of the 'primary' regime types regarding the resulting forms of stratification would offer conceptual insights in terms of understanding the origins and consequences of different regime types. However, following Esping-Andersen in seeing decommodification as the main defining characteristic of regime types, a bifurcated welfare state could then be seen as one possible variant in terms of the system of social stratification embedded in different regime types. Bifurcated welfare states could therefore be understood as one type of hybrid welfare state, but their hybrid nature

would be best understood as combining elements of different and more abstract ideal types, rather than resulting from statistical clustering of a wider range of data.

The ideal type of a bifurcated welfare state offers a new dimension for research on welfare regimes, or more accurately, recovers Esping-Andersen's second dimension of social stratification in the construction of ideal types of welfare regime. In Esping-Andersen's original typology his three ideal types were identified primarily with regard to how states dealt with securing welfare through decommodification. Each main strategy that formed the basis of a different ideal type of regime was then also recognised as having implications for social stratification. Subsequent research was able to explore the stratifying consequences of each type, enabling empirical research into whether each strategy had consequences for equality. However, the main application of the ideal types was in research that explored in more detail the mix of policies entailed in each type and their effectiveness and efficiency in delivering welfare to different sections of the population.

In moving down from the high level of abstraction of the three ideal types and introducing more detail, researchers were sometimes confronted (as is the norm for a Weberian ideal-type based methodology) with the reality 'on the ground' of welfare systems that did not conform very closely to the ideal types proposed by Esping-Andersen. This led to the proposal for new additional ideal types (for example, those mentioned above that incorporated questions of gender and family relations, or those which applied to different regions or groups of countries). And especially in research into CEE countries after 1989, such research has focused on the question of hybrid regimes that combine different features of two or more of the ideal types proposed by Esping-Andersen or others who sought to modify his scheme. As noted above in relation to the work of Kuitto and others, this has resulted in significant contributions to our understanding of the detailed operation and consequences of the particular welfare mixes, and their effectiveness and efficiency. However, the hybridisation argument in itself does not tell us much about how these welfare states work. One important contribution of Szalai is how she shows that beyond the hybrid welfare regimes there might be some features that fit CEE countries more than non-CEE welfare states, and that there might be important variations in bifurcation among CEE states, according to, for example, the presence of large Roma minorities, or the inclination to follow the EU social inclusion agenda.

In the discourse on welfare state regimes since the 1990s the consequences of regime types (whether pure or hybrid) for social stratification has received relatively little attention - as commented on by Esping-Andersen (2015) in a retrospective review of research since the publication of his 'Three Worlds' book. However, in the context of the globalisation, liberalisation and changes in the nature of employment, with increased casualisation and the decline of stable career structures for increasing numbers of people, and especially following the crisis of 2008 and the widespread imposition of austerity policies since then, the issues of social exclusion, poverty and inequality have received increasing attention. This has been reflected in the growing focus on dualisation and its different forms and consequences in different societies in the fields of political economy and economic sociology. As noted by Davidsson and Neczyk (2009: 1), such research has explored dualisation as reflected in the 'growth of a group of people who are at risk of finding themselves at a permanent disadvantage in

the labour market and in other spheres of society'. Moreover, such dualisation is not simply developing in parallel in the labour market and 'other spheres', but the processes in each sphere would seem to be intertwined and possibly mutually reinforcing. Such interconnections were noted as early as the 1980s by Quadrango in the US where 'changes in benefits programs are related to changes in the labor process', for example by relief programs that maintain 'a pool of marginally employed, low wage workers' who can be moved as employers require between relief assistance and poorly rewarded temporary jobs (Quadrango, 1987: 123-124). Similar interrelations have also been noted in countries with Bismarkian social insurance based welfare states (Palier, 2010).⁷

In a wider ranging analysis, Emmenegger et al. (2012: 14) argued that, driven by large-scale economic trends such as deindustrialisation and globalisation and reinforced by policy choices promoting liberalisation, in different countries to different degrees there has been growth in inequality, in the incidence of low pay and in the flexibilisation of employment, and this has prompted a political struggle 'in which politically and economically stronger groups are using their power resources to insulate themselves from the negative effects of structural pressures', and this 'translates into the social policy realm'. There it can be seen in 'a process of dualization' where policies increasingly differentiate rights, entitlements and services provided to different categories of recipients' (Emmenegger et al., 2012: 8).

There are close parallels between this analysis, embedded in the political economy literature on dualisation, and Szalai's analysis of the emergence of the bifurcated welfare state. Accordingly, there would seem to be a potential agenda for research that explores these connected dualisation processes in the economic and social sphere that could yield new insights in their genesis and trajectories. As suggested above, such research aimed at providing a macro-level explanation of social processes is better served by a methodology that seeks to provide an account based on ideal type abstractions of the factors that are hypothesised to be the main determinants of the processes under examination. Although real type analysis may be better suited to providing rich and empirically complex descriptions of prevailing forms of welfare regimes, there is an important role for ideal typical approaches such as those derived from Esping-Andersen's work, and of which the work of Julia Szalai on the bifurcated welfare state is an important contribution.

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⁷ While the dualisation literature has mainly focused on labour market exclusion and inclusion, the issue of new, fragile forms of employment and the private - public divide, for example in the dualisation of health care systems, bifurcation has focused more on welfare provision, especially in the US.

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