

# Introduction

## Welfare states and gender in transformation

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### New diversity, new inequality, old traditions?

When the European Union (EU) accepted twelve new members in 2004 and 2007, ten of those new member states were formerly Eastern Bloc countries. With the exception of Slovenia, these countries<sup>1</sup> were part of the Soviet sphere of influence before 1989 and, as state-socialist countries,<sup>2</sup> they share some similarities. First, the social differences within each country were diminished, among other things due to general participation in working life, relatively low wages with a narrow wage gap as well as redistributive social policies. For the majority of the population, social security provided a relatively low level of protection compared to Western countries, and many entitlements were linked to employment (some were also linked to family context). Social security systems were based on employment but also developed a strong universalist impact due to the high demand for workers and extent of centralized state regulation (Keune in this volume). Thus, for example, old-age insurance was generally based on the social security principle. The insurance was part of a single state insurance system under which all employees were insured (for details, cf. Müller in this volume). Unlike the typical case in the West, companies alone were responsible for contributing to the pay-as-you-go system. There was also a high level of interpersonal redistribution, for example through a minimum pension. In contrast, the health care system was organized solely by the state and financed by taxes. It guaranteed universal access to care, although the quality of that care was limited in some cases (Hacker in this volume).

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1. Or the countries they had been a part of: in the case of the Czech Republic and Slovakia, the ČSSR; Estonia, Lithuania and Latvia had been part of the Soviet Union (USSR).
  2. Like the research, terminology covering the phase of development of the CEE countries between 1945 and 1989 has not been finalized. Today this period is most often referred to as Communist, real socialist or state socialist.

Second, employment among women, including mothers, was very high according to international standards. This phenomenon was associated with clear progress towards greater equality between women and men in working life, which in turn was associated with traditional inequality structures in such spheres as the family. On one hand, women were highly qualified. Until the end of the state-socialist period, employment among women was accepted as a matter of course and economic necessity, which was supported through comprehensive public childcare. On the other hand, neither the gender-specific division of labour nor the traditional male role were questioned in public discourse, which placed an extreme burden on most women working full-time in these countries.

These Central and Eastern European (CEE) countries experienced a dramatic political and economic change during the transformation process through to EU accession. A comprehensive change of system from dictatorial state socialism to capitalist democracies took place. The impact of this change on the nature of the welfare states and gender regimes of these countries has thus far only been studied in extracts.

In terms of social security systems, we are left asking to what extent the transition from a socialist to capitalist economic system was accompanied by a radical break with the socialist welfare state model. Did the new system tie into existing structures under entirely new premises – including the phenomenon of mass unemployment, which was unknown in the socialist system? Did the new system tap into even older traditions from the pre-war and inter-war periods? Or did it orient itself toward new models from the West, and if so, which of the predominant Western welfare state models can be considered defining examples? At the same time, the social security systems in Western Europe likewise found themselves in a period of transition. The research largely agrees that this has thus far not resulted in a uniform system type: national differences and traditions have continued (e.g. Czada and Lütz 2004; Keune). Nevertheless, certain convergence processes – such as the triumph of the three-pillar paradigm in old-age insurance (e.g. Hinrichs 2008) or activating labour market policies<sup>3</sup> – can be detected. In what direction are Europe's social systems headed, and what is the CEE countries' position in this process? These questions are especially explosive in light

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3. Considerable national differences remain, however, for example the specifics of activation policies (e.g. Klammer and Leiber 2008).

of the EU's current constitutional crisis given that the answers to them will have a considerable influence on shaping a social dimension of Europe (for detailed information, cf. Baum-Ceisig *et al.* 2008).

Although comparative welfare state research has focused increasingly on these questions, the findings have thus far been inconclusive, and the development of suitable analytical frameworks has not been completed. The only definitive conclusion is that no uniform Central and Eastern European welfare regime has developed. While some authors have focused more on the liberal or residual nature of the social states in CEE, others have diagnosed hybrid systems in which structural elements of the conservative-corporatist welfare state model according to Esping-Andersen's (1990) typology dominate (in detail, cf. Auth).

In terms of gender equality, the effects the change of system had on women and men must be identified. Although gender equality was not achieved under state socialism, clear equality-policy gains were made, which now seem to be in jeopardy. It became apparent as early as the early 1990s that gender relations would shift. The political arena saw a drastic drop in the percentage of women in parliaments and governments (Klein), while a large number of women in the labour market lost their jobs. But how does the way women were affected by rapidly increasing unemployment and growing social inequality differ from the way men were affected? Could the degree of equality achieved be upheld, or would social inequality, including gender inequality, intensify?

A wide range of studies have since been conducted on the state and development of gender equality. The majority have addressed men's and women's participation in the labour market. Some do so for individual countries and some compare countries (cf. Auth and Klein). Women have been viewed as the "losers of the transformation process" since employment among women decreased markedly and women were particularly affected by growing social inequality and poverty. A few in-depth analyses have since been conducted, showing that the blanket image of women as losers does not actually apply across the board. Developments did not take the same course in all countries and all policy fields. Moreover, different groups of women were affected in different ways. When viewed as a whole, the state of research on the impact of the transformation process on gender inequality is still conflicting (cf. Auth) despite the certainty that women face numerous additional risks such as unemployment, difficulty in re-entering the job market following

childbirth, and deskilling. The overall degree of social equality achieved could not be maintained. The following questions have not yet been answered: How do the new economic and sociopolitical conditions each affect men's and women's social situation? How did the gender-specific segregation, the income situation and the representation of women in leading positions develop? Has the gender-specific domestic division of labour in families in Central and Eastern European countries weakened or become stronger since the transformation?

In addition, there is still need for analyses of the causes of gender inequality: What role have economic, political and cultural conditions played since the change of system, to what extent were certain developments determined by political decisions in the transformation process, and to what extent do inequalities and structures that existed before 1989 continue to have an impact? Comprehensive analyses of the predominant gender regimes in individual countries are also largely needed (cf. Auth; Betzelt 2007).

Further, there has been little systematic examination of the interrelation of welfare states and gender equality in Central and Eastern Europe. It has not yet been proven whether a particular type of welfare state predominates, nor has there been comprehensive study of the way in which welfare-state provisions have shaped and changed gender equality. The effects that changes in family policies and pension reforms over the past 20 years have had on women have been described to some extent, but for other fields – the health care sector, care policies and the fight against poverty – there has been essentially no systematic research (Auth).

## **Central questions and organisation of this book**

This book therefore focuses on (1) changes in the welfare states of Central and Eastern European EU member states<sup>4</sup> in the transformation process, (2) shifts in gender relationships and inequalities, and (3)

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4. The analytical framework was limited to the ten "Eastern" EU member states. But for a few exceptions, other former state-socialist countries could not be included in the analysis. Unless otherwise specified, the countries will be referred to as the Central and Eastern European countries (CEE countries) or EU 10 for linguistic simplicity. The use of the term "Central and Eastern Europe" to refer to these countries is controversial, yet very common. Since alternative terms such as "Central East Europe" are also imprecise, we have opted for this variant.

interdependencies between these two processes. This book has its roots in a conference held by the Institute of Social and Economic Research in the Hans Böckler Foundation (WSI) together with the DGB-Bildungswerk in October 2006. A problem-oriented approach was chosen for the conference and for this volume of collected works due to the patchy state of research. The initial aim was to find first answers to these three batteries of questions using a relatively wide empirical comparative basis, and to bring researchers from Eastern and Western Europe into the dialog.<sup>5</sup> This collection can therefore be understood essentially as the impetus for additional future networking between the East and West, and even stronger theory-driven comparative research as a result of that networking.

The search for important similarities and differences between the old and new EU states has been condensed into the question of whether the welfare typology of the three “worlds of welfare capitalism” (Esping-Anderson 1990) – to which a Southern European variant has since been added (e.g. Leibfried 1992; Ferrera 1996) – applies to the CEE countries or whether a new or even multiple new types of welfare states have developed. We were also interested in determining whether concepts that were developed by Western feminist welfare state research can be used to analyse gender relations in the CEE countries and to classify gender models. Part I of this collection is dedicated to these theoretical-conceptual issues as well as an overview of English and German-language research conducted in this area thus far<sup>6</sup>.

The authors in Part II of the book address the issue of changes in gender relations and possible influencing factors from different perspectives and with a focus on different countries. They emphasise changes in the participation of women and mothers in the labour market, and examine aspects of time, income and power distribution between men and women. Economic conditions, institutional traditions, changes in values and attitudes, European Union equality policies and changes in family and work-life balance policies in particular are pinpointed as factors explaining identified change or continuity.

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5. For the participants, see the Preface.

6. Cut-off date for the studies included is spring 2008. This is related to the publishing date of the German version of the book (see also preface).

Part III of the book analyses the interrelation of policies in additional social policy fields and social gender inequality. This part centers on the effects the organisation of welfare policy has had in the areas of old-age insurance, health care, labour market policy and the fight against poverty on solidifying or reducing gender inequalities. Never has there been such a broad synopsis of the gender-related effects of social policy reforms in Central and Eastern Europe. Inversely, articles in Parts II and III of the volume examine the effect that existing and historical divisions of labour between men and women and predominant gender models, which differ in the different countries, have had on welfare state systems. Social policy is oriented toward certain gender models in each case. Social policy measures are designed according to which assumptions of men's and women's "normal" and desirable behavior are taken as the basis for policies. In turn they provide the framework and in some instances motivation for people's behavior. The articles show, however, that there is no clear clausal relation between welfare states and men's and women's behavior. Key intervening variables include not only cultural traditions, but also, and especially, economic factors (cf. Pascall and Kwak; Křížková *et al.*; Klenner and Hašková; Ratajczak-Tuchołka).

The individual articles emphasise different comparative aspects: historical comparison and comparison of Western (EU 15) and Eastern (EU 10) countries. Some authors studied and compared a few individual countries regarding specific topics to test the viability of theoretical concepts (cf. Szikra and Szelewa) or to go into more detail when shedding light on differentiated circumstances and different factors of influence in the countries (cf. Michoń; Ratajczak-Tuchołka and Klenner and Hašková). We have deviated from our comparative perspective in including an article on a previously little-researched area, which is nonetheless especially important for some of the CEE countries: the role of informal work. Luleva's case study of Bulgaria could potentially serve as a starting point for further research on informal work in other CEE countries. The article demonstrates clearly that the growing importance of informal work affects the unequal position of women, especially given the continuing gender role stereotypes in Bulgaria.

In the historical perspective, we were interested primarily in the extent of change and continuity in the transition from state-socialist to capitalist countries in terms of social policies and gender relations. All articles examine more or less specifically and in more or less detail the issue of past legacies, which direction changes took, and how this legacy

influenced social practice and the policies of institutional change in the period after 1990.

## **Common findings**

What direction have Central and Eastern Europe's welfare states taken?

The articles in Part I of this volume concern the ability of previous typologies of comparative welfare state research to represent the changes in CEE countries. They suggest that it would be incorrect to assert outright that analysis tools from Western comparative research cannot apply to the transformation in the welfare states in CEE, though these tools must be honed and refined. Auth, for example, indicates the necessity of expanding tools used for analysis in Western welfare state regime research to better account for particular factors in development or the strong influence of the informal economy in many CEE countries for instance. Despite a range of difficulties inherent in fitting certain CEE countries into existing “Western” analysis categories,<sup>7</sup> Szikra and Szelewa nevertheless advocate studying the development of Central and Eastern Europe according to these categories and making use of the tools instead of “forcing” the region into a separate and uniform category. According to the authors, the explanation of the formation of Esping-Andersen’s three “worlds of welfare capitalism” based on the analysis of power resources could be “reinterpreted” for the state-socialist welfare states. They do not view the power resource theory as an utterly unsuitable explanation tool for the CEE countries, however. Although they believe that party coalitions cannot be studied in the same way as in capitalist democracies, the focus could instead be directed toward illegal social movements such as Solidarity in Poland or the role of the Church. In terms of today’s welfare systems in CEE, Szikra and Szelewa believe that Esping-Andersen’s (1990) three central levels of analysis – the degree of decommodification and stratification and the interaction between the state, market and family in the welfare state – continue to be suitable for comprehending the nature of the systems and enabling comparison with Western Europe.

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7. As Szikra and Szelewa rightly note, several Western European countries also face these problems, which accounts for the especially lively debate surrounding the application of the Esping-Andersen typology (1990) to real-socialist states.

The article by Keune takes a similar approach. Keune uses the four welfare state regimes popular in comparative welfare state research – liberal, social-democratic, Bismarckian and Southern European – as the analytical framework for classifying the welfare states in CEE. He comes to the conclusion that the CEE welfare states should be characterized as hybrid types and are not a perfect fit for one of the four “Western” regimes. The welfare state institutions of each CEE country exhibit a specific mix of elements of the four traditional welfare state types, with the result that one cannot speak of a uniform fifth “CEE world.” Although Bismarckian structural elements such as the principle of insurance are widespread, universalist and market-like structures also play a role, with different focuses in each of the individual countries. In terms of the level of social spending, one could speak of minimalist welfare states, with the exception of Slovenia. Despite the rise in economic growth in recent years, social spending has not caught up, observes Keune, as was the case in the Southern European EU member states following EU enlargement to the South. The CEE countries fall roughly into two groups in terms of relative income poverty and unequal distribution: the Baltic states, Poland, Bulgaria and Romania on one less well-off side, and the Czech Republic, Slovenia, Hungary and Slovakia on the more well-off side (and in some cases much more so than some of the old EU member states) (cf. Keune and Steinhilber). Steinhilber points out the weaknesses of relative poverty measurement and the income-based poverty risk approach, however. While the situation in the CEE countries in general does not seem excessively dramatic according to these indicators, this finding is relativised when indicators measuring absolute poverty are taken into account.

Examining reforms in the individual policy fields of old-age insurance, health care, family and poverty policies also produces a differentiated picture. Although the picture cannot be described unilaterally using such catchphrases as benefit cuts, risk privatisation and liberalisation, such trends cannot be discounted, especially since the mid-1990s. All EU 10 countries had in common that immediately following the change of system social policy was initially used as a buffer for absorbing the social costs of the transition to a capitalist economic system. Only after this phase, in which the trend was to expand social benefits (especially in the areas of early retirement and disability in order to absorb unemployment), did a second phase with a greater focus on financial consolidation of welfare systems take place. This second phase ran into difficulties, primarily due to rapidly increasing numbers of recipients,

decreased tax and social insurance revenues, and demographic changes. The process, however, took very different courses in different countries since welfare state reforms were hotly debated in all parliaments and policies that cut social benefits could not be implemented offhand and everywhere (Keune). Consequently, not all countries followed the same trend (toward liberalisation) in all areas, although this trend was the subject of much propaganda on the part of international actors like the World Bank.

In the area of old-age insurance, eight of the ten countries (excluding the Czech Republic and Slovenia) have partially privatised their pension systems. After a first wave of reforms made changes that were primarily gradual and inherent to the system (e.g. raising the legal retirement age, dismantling redistribution elements, improving contribution-benefit equivalence), reforms since the 1990s have led to hybrid systems of pay-as-you-go and pre-funded financing. The level of the pay-as-you-go pillar was generally reduced and a second, often mandatory pension pillar (in the form of a private pension fund system) was introduced, fed almost exclusively by employee contributions (Müller and Ratajczak-Tucholka). All EU 10 countries except Latvia changed to a primarily contribution-financed health insurance model following the collapse of state socialism. Access to the health care system, however, remains universal in many countries. In other words, it follows the citizenship or residence principle, whereby the state generally makes contributions for the non-working such as the unemployed and women on maternity leave. In many countries, however, the ratio of those paying into the system to those whose contributions must be paid by the state dropped dramatically – also as a result of high unemployment and economic crises. Like many Western European countries, many CEE countries added reforms of the expenditure side – e.g. Diagnosis Related Groups, managed competition or outsourcing of services – to the agenda to overcome financing problems. In addition, not only are direct out-of-pocket-payments of patients higher than in the EU 15 average – except in Slovenia and the Czech Republic –, informal co-payments in the health care system are also common. Nevertheless, even in health care policy the specific form and effectiveness of individual systems vary greatly among the CEE countries (Hacker).

## Can typologies developed for the West be used to describe the change in gender relations?

In addition to presenting findings on equality, this collection examines whether analysis tools developed for Western Europe can be applied to the CEE countries. Szikra and Szelewa show how the concept of familialism (Leitner 2003) can be used to analyse family policies in Hungary and Poland: “implicit familialism” in Poland and “optional familialism” in Hungary are studied in detail, and their origins are traced back to the time before World War II. Michoń also analyses familialism in Estonia, Latvia and Lithuania in a comparison with Poland.

Pascall and Kwak as well as Klenner and Hašková apply the analytical framework of the “male breadwinner model – dual earner model” spectrum (Lewis 1992, Crompton 1999, Pfau-Effinger 2000) and show that gender arrangements in all CEE countries had developed away from the male breadwinner model toward the dual earner model before 1989. Pascall and Kwak, modeled after Pascall and Lewis (2004), develop a five-dimensional analytical framework – based on employment, care, income, time and power – and demonstrate that a differentiated analysis is necessary and that one cannot merely speak of a movement along the traditionalisation / re-traditionalisation axis. They come to the conclusion that the regimes that emerged during the transformation process should be classified as systems with relatively strong collective support for employed women and with only a few features of the male breadwinner model.

Likewise, Szikra and Szelewa dispute the idea of unilateral re-traditionalisation. They believe it makes more sense to speak of a common re-familialisation trend and of different familialisation paths which they analyse in detail for Hungary and Poland. Klenner and Hašková diagnose gendered familialism for the Czech Republic, which took hold particularly after 1989, but began as early as the state-socialist period. In their Czech-German comparison, the authors also point to a necessary differentiation when applying the “male breadwinner – dual earner model” spectrum. Different varieties of the dual earner model developed in the GDR/Eastern Germany and the Czech Republic/ČSSR, which led to different effects on equality policies during the transformation process. The extensive dual earner model with public childcare was increasingly continuous in the GDR throughout one’s lifetime, while this dual earner model developed into an interrupted variation in the ČSSR; in other

words, mothers increasingly took several years of leave following childbirth. These differences in employment among mothers of small children began to take shape in the late 1960s and were greatly intensified by the changes during the transformation process. Consequently, Czech mothers of small children had far fewer employment opportunities than East German women.

### Central findings on gender (in-)equality: employment and childcare

Several articles use different indicators to measure the inequality of men and women and the degree of gender equality achieved, and to examine the paths gender relations have taken in these countries. If we first look at labour market participation, the analysis shows that employment among women has dropped dramatically in all new CEE member states (cf. Pascall and Kwak and Křížková *et al.*). Yet, despite the massive drops, it is above the EU 15 average in some countries, such as Slovenia and the Baltic states. Gender-specific discrepancy in employment rates is lower in all CEE countries except the Czech Republic than in the Western EU countries (Pascall and Kwak). However, the unemployment data show that women face high workplace risk in the new member states. Unlike during state-socialist times, today childbirth in particular puts the mother's professional (re-)integration at risk, and if women do re-enter the workforce, they face considerable work-life balance difficulties. Part-time work is only marginally available in almost all countries, and essentially no state policies or workplace approaches for improving the work-life balance have been developed thus far (cf. Pascall and Kwak, Křížková *et al.*). Consequently, employment among mothers is especially low in some countries, such as the Czech Republic (cf. Klenner and Hašková), Poland and Hungary (Michoń; Szikra and Szelewa). The effects of state cuts in spending on public childcare, the discontinuation of company level support structures and the generally unstable labour market can be felt in these countries. The number of children in day care facilities has dropped considerably throughout the course of the transformation. In a few countries, only a limited number of childcare facilities for children under three are still available (e.g. the Czech Republic and Poland). Mothers therefore are more likely to care for children under three at home: parental leave thus plays a major role. Most countries grant three years of parental leave; only Slovenia offers shorter and flexible leave up to the child's eighth year. The level of job

security guaranteed during parental leave varies greatly, however (Pascall and Kwak; Szikra and Szelewa). The Czech Republic grants the longest parental leave period (4 years) in Europe but without a job guarantee. Here, as in other countries, taking longer parental leave is associated with considerable job market risks, and as a result, some women choose not to take leave. Unlike nurseries, kindergartens for children between three and six years are widely available and accepted in the CEE countries. The percentage of children aged three to six in kindergartens ranges from 56 per cent in Poland to 87 per cent in Hungary.

Apart from the difficulties faced by mothers of small children, women nevertheless succeed in holding on to their status as a breadwinner in the dual earner household. The gender-specific discrepancies are not as great as in countries with a male breadwinner tradition dating far back in history, such as is typical of Ireland (Pascall and Kwak). The articles in this book demonstrate that no single gender regime predominated in the period of state-socialism in all countries in Central and Eastern Europe, despite outward appearances, and that different paths with different effects on the genders were taken during the transformation process (cf. in particular Szikra and Szelewa; Klenner and Hašková; Křížková *et al.*). Pascall and Kwak show that in some dimensions, such as the gender income gap, the differences between CEE countries are greater than the differences between the Eastern and Western EU countries.

### Traditional gender-specific division of domestic labour and attitudes toward gender roles

The undisputable successes of greater equality in men's and women's social roles under state socialism – the opportunities for women in education and professional activities sufficient for earning a livelihood – were in stark contrast to the almost uninterrupted continuation of the traditional gender-specific division of family labour (cf. Luleva; Pascall and Kwak; Klenner and Hašková). Little changed during the transformation process, although the attitude has become more widespread among younger parents, that ideally both parents should participate actively in childcare duties (Pascall and Kwak). There is a large gap between attitudes and actions, as is the case in Western countries. Thus men in CEE in fact almost never take advantage of their entitlement to parental leave (cf. Michoń; Szikra and Szelewa).

This division of duties, which discriminates against women, has persisted in part because the male role was never questioned during socialism or during the transformation process. Women were expected and able to work, but the issue of who is responsible for caring for the family has never been debated publicly – either previously or in recent years. The realisation that a change in how work is shared can change something not only for one of the genders, but also that large-scale integration of women in the professional world must bring about a redistribution of unpaid work to men as well, and that this does not have to create serious conflicts or care deficits or overburden women has still not been made in many cases today. This fact is also common to CEE countries and Western Europe. Yet, while welfare state policies in a few Western countries are oriented at least rudimentarily toward men's participation in childcare – such as income-based parental allowances, bonuses for shared responsibilities between mothers and fathers, or paternity leave in some countries, including the Scandinavian countries and Germany – many Eastern countries have not even begun to debate such policies. Barring Slovenia, none of the CEE countries as yet have implemented legal provisions for paternity leave (cf. Pascall and Kwak).

If the governments of the new EU states do not design active equality-oriented policies aimed at gradually overcoming traditional gender roles, this reticence appears to be legitimised by the attitudes of the population. Traditional values relating to gender remain deeply entrenched in sizeable portions of the population of the CEE countries (cf. Klein; Luleva; Křížková *et al.*). This traditional way of thinking can be explained on one hand by the manner in which the leaders of state-socialist countries pursued the policy aim of increasing employment among women “from above.” On the other hand, it reflects the many years of largely no democratic public and thus no widespread discourse of gender roles as well as the lack of basic civic liberties that would have allowed women to agree on gender inequality and organise. Women's struggle for women's rights took place behind closed doors in state-socialist times. Despite notable changes, the attitudes of the population were in reality much less modernised than in many Western countries. The traditional views of gender roles have only recently begun to become more modern (cf. Klenner and Hašková). In Poland for example, the view that men are more entitled to a job in times of job shortages than women became much less widespread between the end of the state-socialist period and the end of the twentieth century; this view also lost ground in all Baltic states (cf. Michoń).

One finding has emerged in several articles: Unilateral policy orientation toward integrating women into the labour market makes it easier in economic crises to retract progress toward equality that is generally made when employment among women is increased. More permanent effects on equality between men and women arise in places where these issues have long been rooted in civil society and the public consciousness – such as in Slovenia (cf. Křížková *et al.*). The opportunities for opposing a policy that would have traditionalised gender policies were greater in a country such as the GDR as well, where attitudes toward gender roles had long since been modernised and acceptance of the traditional gender-specific division of labour no longer existed in the early 1990s (Klein). Cuts in social policies, such as reductions in public childcare for small children, were avoided to some extent here since the population lobbied for retaining the public childcare system for small children. In other CEE countries, where the population's attitudes were shaped by more traditional gender roles, there was little resistance against deteriorating conditions enabling women to secure their livelihood individually.

Change in this area has begun in recent years, in part under the EU's influence: equality deficits are gradually being acknowledged among the population, and legislation has focused increasingly on equality between men and women (cf. Křížková *et al.* among others). Klein's analysis, however, gives cause for hesitant optimism at best toward the EU's conducive role (similar to Treib and Leiber 2006; Bönker 2006 for EU social policy in general). The author examines the impact accession has had on promoting equality policies in the CEE countries. Her findings are predominantly critical. Although the EU's *acquis communautaire*, which the countries were required to implement in their national laws upon joining the EU and which has become quite sizeable in terms of equality policies, and although implementation of the legal foundations is largely complete, *de jure* equality cannot be equated with *de facto* equality. Implementation of legislation in practice continues to face considerable hurdles since there is a lack of mechanisms and tools for actually enforcing the law. The lack of support of equality policy in civil society also plays a role.

## How do social policy reforms affect gender (in-)equality?

Although the conclusions of this collection of works do not suggest a determinist relationship between the embodiment of the welfare state

and gender equality, the picture that emerges, especially from the articles in Part III of the book, give little reason to be optimistic that women's situation will improve. But for a few exceptions, scarcely any explicit approaches for gender-sensitive social policy design have been identified in the areas of old-age insurance, health care, labour market and poverty policies that we have examined in detail. Other problems are often considered more urgent in the policy debate. On the contrary, welfare state reforms, especially those carried out since the mid-1990s, have almost always increased risks to women. In the area of old-age insurance for example, the partial privatisation of old-age insurance without mandatory unisex scales has reinforced the principle of equivalence and employment focus. Combined with weakening compensation mechanisms for child rearing and elderly care and with minimum retirement ages that often remain low for women in systems with defined contributions,<sup>8</sup> this has led to much lower expected retirement benefits for women than for men. The gender-specific pension gap is expected to grow considerably. Encouraged by policy recommendations from the World Bank to that effect, pension reform processes focused primarily on issues of financial consolidation of pension systems, and changes – in some instances fundamental ones – failed to take the gender perspective into account. Since women often interrupt their professional life, increasingly receive below-average wages and continue to assume the main child rearing and elderly care tasks, the new system logics discriminate against them, and feminisation of poverty among the elderly can be expected (Müller).

The Ratajczak-Tuchołka case study of Poland highlights the inconsistencies in the normative ideas regarding women's retirement provisions that can be contained in the transformed pensions systems – along with their negative consequences on the level of protection and opportunities for women to obtain old-age insurance independently of their partner. The author describes the Polish pension system before and after the “great” 1999 pension reform in its potential effects on gender arrangements and comes to the conclusion that the new system provides much stronger incentives to support the male breadwinner model, even though the male breadwinner model does not seem to have taken hold in the CEE countries as a whole – due to reasons not inherent in the social

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8. In systems with defined contributions, the amount of contributions is defined in advance, not the amount of benefits. Benefits depend on the contributions actually paid. In such systems, a low legal minimum retirement age for women reduces women's pension level.

security system. Hacker's findings on health care policies also show a mixed picture. While health indicators such as the life expectancy and mortality rates of mothers point to an improvement in women's circumstances, women face particular pressure in this area because equal and universal access to health care is in fact undermined in many cases (e.g. through formal and informal co-pays or benefit cuts; Hacker).

Křížková, Nagy and Mrčela examine labour market participation, reforms in this policy field and the consequences on policies in their comparison of the Czech Republic, Hungary and Slovenia. The most recent legislative changes, some of which can be attributed to EU accession, have improved the legal framework for gender equality in all three countries, but there is still no comprehensive gender mainstreaming strategy in labour market policy in Hungary and the Czech Republic. In contrast, the political framework of action for gender equality in Slovenia has improved considerably in the last ten years through legal changes. Consequently, the findings on gender equality, for example the gender-specific wage gap, are also better in Slovenia than in the Czech Republic and Hungary.

Steinhilber highlights new risks of growing poverty among women, the considerable lack of research and data in this domain, insufficient policy answers to gender differences and the lack of mobilisation opportunities regarding the topic of gender and poverty. She has also diagnosed a foreseeable trend toward greater gender-specific differentiation of imminent poverty risks, for which policy answers must urgently be found.

## **Outlook and future research perspectives**

This book presents a range of comparative articles that cover the classification of and trends in the welfare states in Central and Eastern Europe. Nonetheless, it also reveals how much research is still needed to reach a level of welfare state and gender research similar to that of Western Europe. This book was not able to include detailed European comparisons in all problem areas covered. Nor were we able to include some areas, such as elderly care policies,<sup>9</sup> despite their relevance, due to a lack of English or German-language research. Further, we were unable

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9. Despite its significance for gender questions, also comparative analyses on Western Europe have long neglected this topic and have focused primarily on childcare.

to include case studies of all countries; studies for Slovakia and Romania are missing. Some findings have been proven certain, while further empirical research is needed for others. In the following we present a selection of certainties and open questions we consider important.

It is undeniable that the transformation process has led to some common results despite the different paths taken in the individual countries. Due to the unemployment that emerged during the transformation, women lost the security of job market integration, which had previously ensured them at least partial economic independence. The social security systems created in the transformation process generally do not offset the new risks women face. Instead they often increase inequality between men and women since job market risks are reflected in partially privatised social security systems with less distribution and a greater focus on employment. The new systems thus negatively affect the security level of women in particular.

Interruptions following childbirth worked against equality in women's professional lives and beyond even before 1989, but they did not present a risk for employment in their lives post-childbirth. The dissolution of this implicit phenomenon presents an additional risk for many women and families, which along with the necessity to work, is expressed in a drop in the birth rate. By the same token, employment among mothers of very small children was not considered ideal under state socialism in most CEE countries. For many, it conflicted with their attitudes, with the result that the transformation process offered these women the opportunity to stay at home longer in line with their attitudes. Policies in most countries supported these positions in some form with increased familialism, though spending cuts (decreased spending for the childcare infrastructure) and cushioning the effects of the economic upheaval were the primary motives. Some articles have demonstrated the negative effects this has had on the equality of women. However, there has as yet been insufficient light shed on this subject. What are the medium and long-term consequences of familialisation for women (and men)? How have employment patterns developed; how have labour market segregation and income gaps changed? Which childcare cultures will become established in the long term, and which are merely due to the transition? How have gender arrangements changed? What trends in the domestic division of labour can be observed? Can countries be grouped into clusters based on these findings?

As mentioned in a few articles, future research must make a stronger distinction according to different groups of men and women: by age and education, professional position and social class, ethnic group (such as Roma, cf. Szikra and Szelewa). It has become apparent that not all women face the risks involved in the market economy and reformed social security systems in the same way. Instead, some, especially those who are highly qualified, achieve personal gains, while many less qualified women are permanently pushed out of the labour market as is evident in the drastic drop in employment rates in the individual countries. These interrelationships require more in-depth analysis. The European Union's policy agenda also makes a case for more detailed analysis since some countries are far below the EU target rates for employment among women – despite their historical orientation toward employment among mothers. Reasons for more profound analysis will be the prerequisites for political reaction.

It would make sense to investigate further whether the (re-)familialisation trend presented in detail here for three countries (Poland, Hungary, Czech Republic) is common to all CEE countries – in this or another form – or if not, which countries deviate from this trend. Further analysis is also required on the possible effects of such a (re-)familialisation trend on demographic development as well as on social gender inequality and opportunities for women, as suggested by Szikra and Szelewa. The trend in birth rates shows that men and women are more likely to decide against a child than against employment under familialist conditions and current economic conditions. This fact may or may not hint at current risks alone. Instead it could be an expression that the majority of women – if they do not have any children or any small children – wants to be employed. Thus, treating female employment as a matter of course under socialism – even if it was not always desired, such as following the birth of children – may persist, highlighting a difference especially from the conservative Western EU countries.

Analyses in Part III show that the social policy reforms studied in this book have largely had a negative impact on women. It would be interesting to classify and differentiate between country-specific differences and variations more exactly – as opposed to employing a general “loser thesis” – and systematically explain how they came to be. Not all countries – for example, the Czech Republic and Slovenia in the area of old-age insurance – have followed current trends such as partially privatising pension systems. Assessing the effects of social reforms on

women's circumstances overall remains difficult due to the lack of comparative analysis in many areas (such as the area of elderly care) and of suitable indicators (for example in gender-specific poverty measurement).

It is certain that the state-socialist legacy is an important factor in explaining the differences found today. There is still need for country-specific in-depth analysis of this historical era based on welfare state and gender model typologies. This book includes articles in this regard, but from different theoretical starting points and not for all countries. Terminology and analytical categories for characterizing the welfare states and gender arrangements in all former state-socialist countries still need to be definitively resolved. This collection has indicated that “Western” analytical tools could serve as possible starting points but that they must be expanded and differentiated. The research agenda should also include a systematic explanation of the effects of the different transformation paths on the shape of welfare states and gender inequality. Some articles in this volume have shown that political decisions on the manner in which the transition was carried out shaped the subsequent 20 years.

In general, the future of the agenda includes a greater focus on examining Western European and Central and Eastern European countries together and comparing them. In addition to theoretical analyses, research must include more exhaustive analyses of the starting points offered by policies and social practices in the different – Eastern and Western – EU countries for gender-sensitive social policy and for promoting equality between men and women.

Studying the effects of the general trends in European policy in this field that were not touched upon in greater detail in this book – improving competitiveness, labour market activation, (re-)commodification, increasing flexibility, as well as efforts to promote equality between women and men and the work-life balance – on the old and new member states and including the repercussions (which may already be taking place) of processes in the CEE countries on the old EU 15 countries will present a major challenge for future research on welfare states and gender equality in Europe.

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