

**Familisation, Ideology, and Populism:
Investigating Reform-making Patterns in Central-
European Family Policy Trajectories**

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Table of Contents

| | |
|--|-----------|
| Abstract..... | 2 |
| Introduction..... | 3 |
| Justifying the Research Question..... | 4 |
| Chapter 1. The Family as Welfare Provider..... | 7 |
| 1.1. Dependent variable: (de-)familisation..... | 9 |
| 1.2. Conceptualisation of ‘defamilisation’ | 13 |
| 1.3. Operationalisation of ‘defamilisation’ | 16 |
| Chapter 2. Changes in Family Policy: How, by Whom, and Why? | 18 |
| 2.1. Theoretical Approaches to Social Policy and Change..... | 18 |
| 2.2. Structuralism-Functionalism | 21 |
| 2.3. Institutionalism(s) | 24 |
| 3.4. Agency, Interest, Ideology | 27 |
| Chapter 3. Case Study Methodology..... | 32 |
| 3.1. Case Selection: Recontextualising the Problem to Central-Eastern Europe | 32 |
| 3.2. Units of Analysis & Measurements..... | 33 |
| 3.3. Measuring (De-)Familisation | 35 |
| 3.4. Assessing Partisan Influence and Exogenous Factors on Family Policymaking..... | 38 |
| Chapter 4. Findings..... | 39 |
| 4.1. Shared Pasts and Different Directions | 39 |
| 4.2. Familisation Landscape over Time: Hungary..... | 42 |
| 4.2.1. Familisation By Expenditure | 42 |
| 4.2.2. Familisation By Policy | 45 |
| 4.2.3. Familisation By Outcome..... | 51 |
| 4.2.4. General conclusions | 54 |
| 4.3. Familisation Landscape over Time: Poland | 57 |
| 4.3.1. By Expenditure | 57 |
| 4.3.2. By Policy..... | 59 |
| 4.3.3. By Condition | 63 |
| 4.3.4. General Conclusion..... | 65 |
| Chapter 5. Discussion on Hungarian and Polish Social Populism | 69 |
| 5.1. How to Understand the Similarities? | 69 |
| 5.2. How to Understand Particularities? | 70 |
| 5.3. Conclusions and Suggestions for Further Research | 72 |
| 5.4. Limitations..... | 73 |
| References..... | 74 |

Abstract

This Thesis, in part upon the recent policy reforms in Hungary and Poland, in part the recent populist upsurge across Europe, and in part in answer to the conceptual inconsistencies of (de-)familisation in scholarship, presents (1) two country profiles on the politics of family policy by applying de-familisation to parties rather than regimes, and (2) a cross-case comparison between latest populist policymakers that have followed oddly similar agendas irrespective of their countries' divergent policy histories. In essence, it finds that the ideological battles in the earlier years of transition fit well into the standard model of right-vs-left welfare politics; however, this changed when the parties that scholarship now calls populists (e.g., Fenger 2007; Fischer 2020; Orenstein and Bugarič 2020) entered into power with oddly similar, but as compared to their respective countries, quite distinctive agendas. This partly supports the theses put forward by Orenstein and Bugaric that in contemporary Hungary and Poland what is happening is the emergence of a traditionalist “fatherland” (2020). Although I must make my reservations based on the data since there have been some significant—yet admittedly insufficient—steps towards work-life reconciliation.

Introduction

Central European (further named CE) welfare states look alike in certain regards while differ in others. Specifically, in spite of their communist past involving extensive welfare provision, nearly all of them were downsized during the transition immediately after the early 90's and subsequently set off onto different trajectories (Szelewa and Polakowski 2020). However, two decades hence, particularly under the rule of the populist-conservative right, there appears a convergence in how CE welfare states address the social problems of populational ageing, increasing female labour participation, job insecurity, and the related decline of the family as a stable welfare provider. Having seen that in particular the Hungarian and Polish populist right placed family and gender policy at the heart of their agenda (see Orenstein and Bugarič 2020; Fischer 2020), this thesis examines the impact of their policymaking on individuals' work-family balance from a *defamilisation* perspective.

This viewpoint looks at how policy affects the way an individual depends financially or socially on the family, which is a complex question of formal childcare availability, leave policy, fiscal and cash-incentives that all influence how family members organise and divide work and family obligations amongst themselves. In more concrete terms, defamilising policies explicitly help women to reconcile work and motherhood by offering, or at least subsidising, formal childcare while familising policies provide cash and tax support to stay-home caretakers, leaving it up to the household to figure out the logistics of childrearing. From this angle, I investigate the alleged similarities in family policymaking in Hungary and Poland further, asking

- 1) to what extent can we talk about a convergence in the way the policies discussed influence work-family dilemmas, and

- 2) to what extent is this convergence explained by the shared ideology of the Hungarian and Polish populist-conservative right, or by other contextual factors, such as labour market developments, international directives, and pressing social risks?

Overall, the analysis traces—defamilising and familising—social policies over the past two decades to find that Polish and Hungarian trajectories, despite their differences, *are* converging under conservative-populist leadership in encouraging cash-incentivised caretaking at home (primarily performed by women) yet I found no evidence that they, or any leadership, could resist the market pressures to expand childcare provision. Despite the verbally familising rhetoric and some tangible policy decision in the familialist direction, childcare has been gradually expanding over the years in both countries irrespective of leadership ideology. Thereby, our view upon what Orenstein and Bugarcic calls the populist fatherland economy becomes more nuanced: populist-conservatives in Hungary and Poland do place distinctively pro-familialist incentives in their family policies but they are far from reversing formal childcare their welfare systems have been providing.

Justifying the Research Question

Although familisation as a concept has received multiple dimensions, refinements and applications, political economy has still little to say about what explains differences between familisation regimes and more importantly, what explains its change. Especially, where one seeks to uncover the root causes of gendered socioeconomic inequalities, recognising that inequalities are not constant, mere regime typologies (e.g., Esping-Andersen 1999; Leitner 2003; Saxonberg 2013) remain necessary yet insufficient to accomplish that end. This Master Thesis in that light asks ‘whether, how and why familisation changes over time in a welfare system’, which is a pressing question after having seen that family policy, with gender norm presumptions at its core, became so central to Central Europe’s right-wing. In doing so, firstly, this Thesis examines the familisation trajectory of Hungary and Poland from 1993 to 2018, from government to government, in the light of partisan

power resources theory, also accounting for alternative explanations drawn from non-partisan theories focused on women in leadership, union lobbying and labour markets, as well as structural-functional claims that policy is primarily objective and instrumental in post-industrial democracies. Secondly, further below, I engage with the growing literature on populist policymaking (see Orenstein and Bugarič 2020; Szelewa and Polakowski 2020; Keskinen, Norocel, and Jørgensen 2016; Schumacher and van Kersbergen 2014; Ketola and Nordensvard 2018) and compare family policy reforms enacted by the Hungarian Fidesz-KDNP (2010-2018) and Polish PiS (2015-2019) administrations in the light of familisation in order to verify or disprove the idea that their recent policymaking has been primarily ideologically motivated.

The primary output of this research are therefore qualitative case studies incorporating substantial quantitative data that test various explanations as to why familisation could change over time within welfare regimes and whether the current populist upsurge means anything to that change. Having seen that populist right-wingers in Western Europe have consistently been hostile to non-native welfare beneficiaries in their countries, there remains a strong hunch that the populist agenda does not stop at notional issues of anti-genderism or xenophobia and may well affect policymaking once they have the power resources to do so (see Keskinen, Norocel, and Jørgensen 2016; Schumacher and van Kersbergen 2014; Ketola and Nordensvard 2018; Kros and Coenders 2019; Röth, Afonso, and Spies 2018; Afonso and Rennwald 2018). Given therefore that Hungarian and Polish populists, beyond anti-migration soundbites, have not only been particularly focused on traditional gender roles and national reproduction over the years but have been also in power for almost a decade, they provide excellent subjects to examine how populism matters to policymaking.

Although several accounts had been made on the CE welfare state, no historical study is at hand that would track social policy changes over time in the region and connect those insights to what

the relevant scholarship had already uncovered and, most importantly, what it had not yet uncovered. Especially (de-)familisation remains conceptually as well as empirically blurry because the relevant literature mostly looks at it as one of the numerous unchangeable features of welfare regime types (e.g., Esping-Andersen 1990; Fenger 2007; Titmuss 1974; Saxonberg 2013; Danforth 2014; Lewis 1992). However, the family policy landscape in the CE region is far from static, given the fact that it was the 1989 liberation from Communist rule that brought about the risks this policy area is meant to address, and different administrations grappling with budget constraints had different approaches to deploying it. Nonetheless, it remains unknown to what degree we can attribute the region's *familisation* outlook to ideologies of political agents or, by contrast, to exogenous forces (e.g., market integration) or path dependence (e.g., communist legacy).

Chapter 1. The Family as Welfare Provider

Social protection is deeply embedded in the history of Continental Europe, and throughout times of war, post-war recovery, financial crises, and economic restructuring, it has proven to be a powerful tool to curtail some major socioeconomic risks looming over its inhabitants. However, the question of social protection, and that of the desirable extent of state responsibility for various sorts of individual risks, remains a delicate one, given its exposure to political caprice and its potentially significant impact on society as a whole. In other words, however the welfare state *should* look like is at once a technical matter of social risk management as well as that of social ethics, which jointly prescribe a set of justifiable instances where state gives a helping hand. In this thesis, I use ‘social protection’, ‘social policy’ and ‘social welfare’ interchangeably, each meaning governmental actions intended to assist individuals and/or groups of individuals (e.g., families, households, etc.) reaching an officially set living standard, “irrespective of the normal market pattern of distribution, often as a social right” (Kamerman, 432). The discussion, moreover, on this topic is rooted back in the qualitative, post-war welfare state scholarship once pioneered by Titmuss (1963), Esping-Andersen (1990) and Korpi (1989), taken together with feminist and gendered approaches that criticised the academic mainstream for overlooking how social policy regulating the family produces gender-biased effects (Orloff 1993). Therefore, this theoretical summary goes beyond quantitative issues of welfare expansion vs retrenchment so far as to the nuanced, specific, and mostly qualitative accounts of social policymaking.

Traditionally, there are three main sources of social welfare besides the state: the market, the family, and charity (Pestieau and Lefebvre 2018). Nonetheless, Esping-Andersen rightfully remarks that both markets and families are artificial creations of the state itself, therefore neither exists independently of it (Esping-Andersen 1990; Esping-Andersen 1999). In that light, a social policy is not only a tool of the state to cushion market failures but also the actualisation of a normative

blueprint regarding the redistribution of socioeconomic risks across a population and, concomitantly, that of social welfare (Fischer 2020). More simply put, the state, from a social policy perspective, should not be regarded as an entity running *after* the market but as one that has the ultimate power to regulate what the market, the family and charities can do and should do—whether or not some administrations do bend to market forces is a different question. A classic instance of this ultimate impact of social policy on all welfare sources is stratification, a term that accounts for how different welfare designs, intendedly or unintendedly, (re-)organise various social-economic relations, including class, status, occupational relations, etc (Fischer 2020).

One of the most fundamental of such relationships is arguably that between the individual and the family. At our current times, the family remains the primary institution of socialisation; an institution that pools more than one individual into a social unit for the sake of maximising their survival and quality of life—e.g., through financial, emotional, or reproductive stability, or else. Even more importantly, it is a decision-making entity with its own internal system of division of labour and responsibilities that underpins its functioning. However, amidst the recent social changes, from female emancipation to job insecurity, traditionally resilient family models, such as the male breadwinner setup, do neither satisfy modern gender equality concerns nor the functions of a stable source of social welfare (Menz 2017). Particularly regarding gender equality, rising female participation in the global west introduced the personal problem of balancing work against family obligations, and since the latter had consistently been assigned to female spouses, many of them are confronted with the need to choose between unpaid caretaking (incl. motherhood) and earning income (European Commission 2013).

Holding everything else constant, however, social security measures can greatly shape the nature of this problem by liberating the family and thereby women from caring obligations, or by doing the opposite and promoting individual responsibility and motherhood. Although the magnum

opuses of welfare state scholarship (Titmuss 1974; Korpi 2006; Esping-Andersen 1990) were criticised in the past for overlooking this, by now there are multiple academic directions that seek to decipher how to address the problem of reconciling family life with labour market participation in an equitable way. This paper looks at defamilisation and family policy.

1.1. Dependent variable: (de-)familisation

As mentioned above, this institution as a welfare source is in an interlinked relationship with the other three, the most important being the state itself. This is so because of, in broader terms, the rise of the welfare state in the past century, and in more specific terms, the unfolding social and demographic risks that frustrate the nuclear family in ensuring its members' well-being at the present time. Recognising these risks, the state *may* assume responsibility for some of them and instate instruments of support to some or all families, altogether called 'family policy' (Kamerman, 430). Given, however, the costs of social protection, family policy is not going to address all risks at full steam but only a handful of them and merely in the manner decisionmakers in power think is best. Always driven by specific goals, family policies may *explicitly* serve to incentivise reproduction, to guarantee a set standard of living, to improve child health, and *implicitly* to encourage/discourage female labour participation, for instance (Kamerman, 430-431). In that regard, given the limited state capacity and selectiveness about the units of social expenditure, family policy is a set of measures supporting only "socially desirable behaviours" (Saraceno 2011, 1). Conventionally, it is comprised of the following instruments: 1) subsidies to parents and caretakers (e.g., allowances, tax credit, benefits, vouchers, etc.), 2) subsidies to private service providers (e.g., elderly care, childcare, etc.), 3) parental leave policy, and 4) early childhood care and education (Rostgaard 2003).

Similarly to the way labour market and other social policies determine the exposure of workers to market forces (i.e., commodification), family policies have the potential to strengthen spouse

dependency on the family, reinforce specific gender roles and family models, regardless of the originally intended effects. McLaughlin and Glendinning's article on women's place in welfare is one of the originators of this concept. According to them, social policies, by changing the landscape of cash transfers, protection and social services, can in effect increase the burden of caretaking (e.g., elderly, childcare) on the family, which in certain cases demand women to stay home to provide informal care on their own while men are at work (McLaughlin and Glendinning 1995). In that perspective, some social policies may be familising in the sense that they render dual-earner family models undesirable for couples, or defamilising by taking over some caretaking tasks in order to facilitate the adoption of those models. The normative concern within this concept is easy to grasp: extremely familising policies can trap spouses into the family if they incentivise single-earner household models, thereby increasing the risks of spouse poverty in cases of divorce (Szabó-Morvai, Bördős, and Herczeg 2019, 5).

This concept has been refined and operationalised in various different ways over the years; so diversely in fact that even the spelling differs from one author to another (Saxonberg 2013). In that light, I henceforth refer by 'familisation' to policies that strengthen dependencies between family members while by 'defamilisation' to ones reducing them (Szelewa and Polakowski 2008; 2020). Although scholarship remains fragmented as to what sorts of dependency the concept covers, and also how familising policies come about, there is no doubt about why it is an important academic topic. Primarily, family policies matter since they affect family members' balance between work and family life in significant ways; one example of this being the wage penalty women tend to suffer after lengthy leave periods in competitive, high-skill labour markets (Sainsbury 1996). Secondly, it matters more than ever because of the commonly cited global economic and demographic changes at our present time—incl. globalisation, rising life expectancy, plummeting birth rates, women's rising labour force participation, high divorce rates—that force welfare states to recalibrate social security in accordance with the new risks they bring. This particularly applies

to the global West. Although it is commonly held that career and family are opposites, based on the Scandinavian experience, one can rightfully suspect that it rather depends on the policy context.

Table 1 Definitions of Defamilisation and Familisation.

| Author | Year | Concept/Notion | Cited Definition |
|--------------------------|------|--|--|
| Esping-Andersen | 1990 | Decommodification | The degree to which social policies permit people to make and maintain their living at a socially acceptable level independent of market forces, without having to sell their labour power on the labour market (21-23). |
| O'Connor | 1993 | Personal Autonomy | The extent to which public services insulate individuals from involuntary economic dependence on family members and/or on state agencies (512). |
| Orloff | 1993 | Self-determination | The extent to which women access paid work and are capable of forming and maintaining an autonomous household (318-322). |
| Lister | 1994 | Defamilialisation | An individual adult's degree of being able to uphold a socially acceptable standard of living, independently of family relationships, either through paid work or the social security system (37). |
| McLaughlin & Glendinning | 1995 | Defamilisation Familisation | Packages of legal and social provisions that alter the balance of power between men and women and between dependents and non-dependents (117). |
| Saraceno | 1997 | Defamilialism | The degree of independence of the family, either through formal care services or compensatory benefits to carers in the family (94). |
| Esping-Andersen | 1999 | De-familialisation Familialisation | The degree of command of one's economic resources independently of familial reciprocities (45). // The degree to which social policy renders women autonomous to become commodified, or to set up independent households (51). |
| Leitner | 2003 | Familialism (explicit, implicit, optional, de-familialism) + Gendering | The extent to which the satisfaction of individual care needs in the family is dependent on the individual's relation to the family (358). The extent to which familialistic policies regulate gender relations (366). |
| Leitner & Lessenich | 2007 | Social De-Familisation | The extent to which caring responsibilities are shared within the family, as opposed to exclusively assigned to one (251). |
| | | Economic De-Familisation | The degree of financial independence of the caregiver(s) from the family (252). |
| Kröger | 2011 | Defamilisation | The degree of economic independence from the family (429). |
| | | Dedomestication | The degree to which social policies make it possible for people to participate in society and social life outside their homes and families (431). |
| Zagel & Lohmann | 2016 | Familising policy | Policy and regulation that foster dependencies among family members by actively lowering their economic and social consequences (53). |
| | | Defamilising policy | Policy and regulation that reduce care and financial responsibilities and dependencies between family members (52). |
| Mathieu | 2016 | Defamilisation | Policy and regulation that provide care services outside the family and/or reduce the economic costs of childrearing (579). |
| | | Demotherisation | The degree of independence that mothers enjoy from the necessity of performing care work, especially childcare (577). |

1.2. Conceptualisation of ‘defamilisation’

For the sake of clarity, defamilisation is not to denigrate the institution of the family; instead, it concentrates on the explicit and implicit responsibilities of family members for one another under a specific welfare regime, with a critical view as to which of these responsibilities could be assisted or taken over by the state in order to ease the burden on individuals. Thereby, the prefix ‘de’ is not to signal the disposal of the family but rather that the individual welfare of family members stems from outside the family and/or from individual, and not family-based, social rights. This rests on the presumption that in all families, members divide up labour (incl. paid and unpaid) among themselves, and that where care needs in the family require full attention, one spouse will necessarily have to become the fulltime caregiver, unless external care providers are accessible. If there are, they may ease the job of caretaker members of the family and thus enable them to pursue paid work away from home (Esping-Andersen 1999, 58). On the flipside, where the burden is large, the family may produce a lock-in scenario wherein there is no incentive for the breadwinner to share in care work to the extent that would enable the other spouse to do paid work as well (Saraceno 1997). According to Esping-Andersen, in this case there is no reason for the earner to spend any time on unpaid chores and for the housekeeper spouse on paid work, since the family would fare financially worse in the end (1999, 59).

The latter scenario is hypothetical in that it largely depends on the policy context in the background. Arguably, the preoccupation exclusively with unpaid caregiving at home would translate into inequity in Christian Democratic regimes wherein benefits are addressed to income-earners and thus stay-home spouses would enjoy merely derivative social rights (Leitner and Lessenich, 247; Pierson 2000, 807). In such regimes, family obligations are at best contribution-funded; therefore, universally accessible formal care provision is rather unlikely—perpetuating the lock-in effect (*ibid*). By contrast, in regimes where the state assumes at least some responsibility for formal family care, even where a spouse voluntarily chooses to stay home, the lock-in effect

would be mitigated, if not eliminated, since the stay-home spouse would always have the option to benefit from social services (ibid). Here, some might be puzzled by the absence of any discussion on market-sourced daycare; this is primarily because private family care is by nature class biased and therefore accessible only to a portion of the population. Moreover, whatever market players do dwells almost entirely beyond the scope of this thesis as it covers policy decisions—although policymaking may well account for market conditions, the decisionmaker, from our point of view, remains the state.

‘Defamilisation’ mostly concerns one’s independence of family reciprocities; yet the nature of that independence differs across its 30-year-old scholarship. In critiquing Esping-Andersen (1990) for making ‘decommodification’ gender-blind, Lister (1994) originally kept the author’s ‘socially acceptable’ level of living as a standard by which she first conceptualised defamilisation, operationalised in terms of family members’ financial autonomy. This was specifically formulated in a way that a caretaker spouse (e.g., housewife and mother) under the male breadwinner model could be regarded as financial autonomous insofar as the state recompensated her with benefits for the unpaid work performed at home. Nonetheless, subsequent literature recognised eventually the puzzling contradictions of this proposition and shifted the analytical focus onto social services (as opposed to benefits), care work and the freedom of choice between entering the labour market and staying out of it. As Kröger (2011, 427) rightfully remarked, amongst the various cracks in the literature, the most characteristic one is this very competition between ‘defamilisation in terms of financial autonomy’ and ‘defamilisation in terms of social services’, such as formal care. The root of this contrast is the fact that mere income-related considerations do not cover entirely the spouses’ balancing act between work and family life. The latter approach, by contrast, mirroring Lewis’ (1997, 175) argument, holds that defamilisation should not arbitrarily assume that financial autonomy is what every woman wants but rather to appreciate the independence of choice between doing paid and unpaid work, and the social policies that influence it.

In that light, the latter concept of ‘(de-)familisation’ is primarily conceptualised in terms of caretaking responsibilities and their distribution between the state and the family, yet it also covers some financial autonomy considerations to the extent that influences work-family balance (Leitner and Lessenich, 247). The question of familisation is therefore not an absolute—e.g., whether women can make a ‘good life’ beyond the family—but a relative one, namely to what extent the family is left alone in its caring functions and responsibilities. Keeping family income constant, thereby disregarding private care, the higher this very extent, the more likely, on the one hand, that caregiving family members will be required to stay home and mainly do unpaid care work, and on the other hand, that care recipients will depend solely on their families in receiving the treatment they need (Leitner and Lessenich, 250). At the same time, full-time caregivers at home become dependent as well, their living conditions being subject to the single income-earner in the family. This is an imperative aspect of the concept since it therefore does not necessarily examine the often-cited cash transfers to families when evaluating family policy, but it rather emphasises the instruments built around childrearing and elderly care, ranging from the de facto provision of formal care services to ancillary policies, such as parental leave rules and personal benefits to recognised caregivers at home (Zagel and Lohmann 2020; Lohmann and Zagel 2016). One must also recognise that the concept does not only concern the caregivers’ viewpoint but also that of the care recipient.

Table 1 above lists the most prominent scholars on this topic in chronological order, providing an overview of how the criticism of Esping-Andersen’s (1990) decommodification evolved into ‘defamilisation’. In distilling the concept into elements in light of the spectacular scholarly disagreements over its proper meaning and operationalisation, I rely on Leitner and Lessenich (2007) and Zagel and Lohmann (2016). While the first academic duo delicately incorporated both ‘financial autonomy’ and ‘social services’ into their bi-dimensional concept, the latter presented a

reasonable logic for analysing ‘familising’ and ‘defamilising’ policies. Their focus on making ‘defamilisation’ measurable in empirical research, with a scope that not only covers economic resources but also structural influences (e.g., parental leave rules, childcare) on work-family balance, is a strong reason why they stand out from others listed in the table.

Before the operationalisation, however, I must also clarify why I do not discuss three other notions that have been introduced either as a complement or an alternative to ‘defamilisation’ over the years; these are Mathieu’s (2016) ‘demotherisation’, Saxonberg’s (2013) ‘genderisation’, and Kröger’s (2011) ‘dedomestication’. In short, Saxonberg’s ‘genderisation’ concept suffers from ambiguity and immeasurability, and can only be applied to specific policy areas, such as parental leave. By contrast, ‘dedomestication’ and ‘demotherisation’ both cover the same issues (i.e. work-family balance) as Leitner and Lessenich’s ‘social defamilisation’, despite their slight differences in scope.

1.3. Operationalisation of ‘defamilisation’

Zagel and Lohnmann (2016) recognised the conceptual anomaly in the ‘defamilisation’ literature which had offered different regime rankings from author to author (58-59). In response, they proposed a way of measuring defamilising and familising policies through two independent composite indices that not only accounted for gender and motherhood but also intergenerational interdependencies within families. It is also imperative to note that they rightfully found that defamilisation and familisation are not two sides of the same coin but may well coexist in different policy areas. The empirical result therefore is not a single score for a country but a label representing both the familising and defamilising aspects of a country or regime (Leitner 2003). This Thesis merges Zagel and Lohnmann’s (2016) and Leitner’s (2003) operationalisation, the former giving the policy elements pertinent to familisation, the latter providing a conceptual framework that help position analysed units to one another.

The part of Zagel and Lohnmann's (2016) concept framework I use for this thesis looks as below:

| Defamilising Policies | Familising Policies |
|---|---|
| Early Childcare | Cash Transfers |
| Individual entitlement for children under 3 | Universal eligibility for child allowance |
| Childcare coverage under 3 | Eligibility with one child |
| Full-time coverage under 3 | Eligibility with three children |
| Childcare coverage above 3 | Tax treatment (credit and/or deduction) |
| Parental Leave | Parental Leave |
| Length of paid maternity leave | Length of unpaid maternity leave |
| Length of paid paternity leave | Length of unpaid paternity leave |
| Benefits as % of personal income | |

Leitner's (2003) conceptual matrix looks like follows:

| Familisation | Defamilisation |
|---------------------|---|
| | Strong Weak |
| Strong | Optional familisation Explicit Familisation |
| Weak | Defamilisation Implicit Familisation |

Sticking to Zagel and Lohnmann's (2016) definition of these policies, I herein explain why the different elements are where they are, and how they can be made into variables. Firstly, the existence of any formal care is a question of social service provision with the aim at easing the burden of caretaking obligations within the family—therefore, all of such elements fall under the 'defamilising' category. However, there exist obligations for family descendants to perform home-sourced care work in favour of the elderly, which with no doubt constitute a familising provision. Furthermore, most cash transfers specifically rewarding and/or funding home-based care work fall under the 'familising' category since they "lower the social and economic consequences" of leaving the labour market and relying on the other spouse's (or family member's) income (ibid, 53-54). By contrast, parental leave provisions are not that straightforward; shorter, well-paid leaves may have a defamilising nature since those kinds facilitate re-entering the labour market, while longer, maybe unpaid, leaves cannot guarantee that. Especially where leaves are less generously paid while cash transfers are significantly high, the overall effect shall be inevitably familising since the policy incentive to stay home is evident.

Chapter 2. Changes in Family Policy: How, by Whom, and Why?

Having set out how family policy is examined through the lenses of ‘defamilisation’, I henceforth explore the possible explanations to the changes in family policy in the same light. In doing so, I also narrow down the scope onto the Central-Eastern European region, this paper’s area of interest.

Particularly on the global west, social insurance programmes were instated around the beginning of the 20th century; yet they would only grow to be the welfare states in the modern sense after the World War II (Congleton and Bose 2010). By the second half of the century, the social budget followed, for Congleton and Bose (2010, 3), the increase of the social risks as perceived by voters and decisionmakers at various points of time—yet all this supply-demand relationship, as they remark, has been exposed to factors that moderated how the electorate and their leaders as well as their institutions perceive these risks and seek to address them. Moreover, the way social risks emerge and are perceived, as well as how that perception translates into actual policies, remains in the diverse terrain of policy change that provide multiple, often conflicting explanations to why we see what we see in a society at a given point of time, and what possible further outcomes we can expect from it in the future.

2.1. Theoretical Approaches to Social Policy and Change

In line with Esping-Andersen (1990) and Pierson (2000), the political economy of the welfare state has been developed based on the classic triad of structuralist, institutionalist and agency-focused theoretical frameworks. While the first approach proposes a law-like logic of development and industrialisation eventually enabling as well as necessitating the expansion of social policy, the second approach emphasises the autonomous features and interactions of formal institutions in policymaking. The third one, by contrast, keeps its focus on particular individual interests—

generally organised into groups—that oftentimes may even overthrow previously embedded structures and institutions. Irrespective of the grandiose debates on their differences and overlaps in political theory, Pierson (2000, 808) aptly sums up the integrative stance on these approaches by stating that

“although these policies are the products of political action, they also create resources and incentives that generate new, often unanticipated structures of opportunity for political groups. In turn, actors and organizations adjust to and seek modifications of *those* policies.”

This integrative approach brought the importance of history to the fore and enabled authors to think in terms of welfare ‘regimes’ so that they could identify and compare distinctive ways in which the state and the economy interact for long periods of time, resulting from particular sequences of “historically generated configurations” (Pierson 2000, 809) of “legal and organisational features” (Esping-Andersen 1990, 2). According to Gauthier (1996, 451-2), regime typologies enabled scholars to identify convergences as well as significant differences across clusters, while also incorporating structural, institutional and political challenges and factors at once. In that light, everything in social organisation (incl. politics, markets, etc.) is intertwined, to a certain extent, with everything else, and this approach gave birth to the idea of ‘path dependence’, addressing the influence of prior policy commitments—incl. the feedback to those policies—on present policymaking (Ulriksen 2012; Pierson 2000). Under these theoretical tenets, policy actors, despite being individuals, formulate their own particular interests based on the policy context they inherit.

In today’s welfare politics, one can identify global trends that are partly sustained by political interests, institutions and structural economic changes alike (Pierson 2001, 1), including responses to those trends in domestic path-dependent regimes—for that, Pierson cites Italy’s and France’s

example with the convergence criteria of the EMU (Economic and Monetary Union) that stirred up overwhelming social unrest in the late 20th century, thereafter weighing on policymakers' shoulders and impeding substantial reform. Whether or not we do accept that change is unlikely, the multidimensionality of Pierson's approach is quintessential for taking an accurate account of what explains change, or the lack of change, in social policy—including our topic of interest, defamilisation. To not only categorise but also to understand social welfare, one must recognise that theoretical regimes are not merely outcomes of culture, politics, circumstances, and inherited processes, but they generate all these things on their own, bringing along their own “policy challenges and political possibilities” (Pierson 2001, 14).

However, holding institutions as channels of individual interest and action as well as resilient to most structural shocks, Pierson's idea (1996; 2001) is that of a stationary policy landscape that grows continuously but slowly as no political actor dares reverse social programmes since there is hardly a voter who favoured retrenchment. This is asserted based on public expenditures over time. Yet as Häusermann (2018) remarks it in her state-of-the-art overview, this theory of permanent austerity works only in specific conditions and policy contexts; in fact, “redistribution between social classes [...] continue to exhibit ideological partisan differences” which produce substantial changes from time to time. Furthermore, akin to the domain of defamilisation, today's welfare policy research goes beyond mere expenditure data towards the nuances of policy designs, such as eligibility, reactivity or non-response to new social risks, and various other policy features that can tilt characterisation in one direction or another. This means that expenditure may look on paper exactly the way it looked decades ago—yet the nature of social protection can still display significant variance over time.

Even though Pierson's take on social policy change is arbitrarily concentrated upon the size of social spending, his *Three Worlds of Welfare State Research* remains a preponderant case for recognising

how these three approaches converge and shape social welfare. Thus, despite the differences between structural, institutional and agency-oriented explanations, the truth lays somewhere in their intersection. To, however, formulate workable hypotheses as to what explains away the changes in defamilisation scores of a welfare regime, one must examine these approaches first one-by-one, highlighting their merits and weaknesses in predicting family policy reform. The following three sections do exactly this, starting with structuralism, then discussing different sides of institutionalism, and lastly, arriving at agency that forms the central hypothesis for this research.

2.2. Structuralism-Functionalism

Social policy has its purpose primarily in redistributing resources across the populace in order to insure against “social risks” (Häusermann, 2018). Such risks include among others ageing, sickness, accidents, unemployment, poverty, disability, and, more pertinent to family policy, risks of pecuniary loss and concomitant existential burden arising from the obligation to care for members of the family, including the elderly as well as the young. Structuralism, as an approach to the study of policy change, therefore, explains family policy change with structural shifts in human behaviour (incl. economic, social, cultural, procedural, etc.) that transcend institutional settings and personal interest and which in one way or another catalyse the emergence of new social risks to the members of a political economy. In other words, structural causes are generally slow-paced changes in values, family structures, labour markets, work cultures, et cetera that are although not independent of institutions and actors, they display fairly small controllability from their part.

Social intervention in that perspective is a functional response to either the foreseeable misfortune to the population in the lack of social intervention against a social risk or to the people’s demand stemming from such risks. The canonical source of these is the socioeconomic development from an industrial to a post-industrial society, that involves the dominance of a professional, knowledge-driven service sector as opposed to manufacturing and semi-skilled labour (Bell 1976). From a

family policy angle, this transition into a post-industrial economy, including women's emancipation and labour market participation, the emergence of the nation state and modern bureaucracy, the weakening of the Church, and several other not exclusively institutional or agent-specific changes jointly produced the conditions wherein policy support to families is at once possible and necessary (Esping-Andersen 1990, 9–10). Primarily, these shifts have put the male breadwinner model to a test both functionally and culturally in the second half of the 20th century, mostly on the global west, compelling states to provide for social security in a world where the economic life of an individual is more unpredictable than ever.

As, however, Gauthier (2002, 444) and Häusermann (2018) point out, structuralist explanations see the world in large, unrealistically homogenous clusters of social phenomena, taking the causes of social risks similar across space, thus often blind to specificities of institutional processes, settings, culture, and political actors. It remains a controversial idea that decisionmakers held a purely functional-rational view about social policy irrespective of institutional rules, processes, embedded cultures, and actors' self-interest and ideologies. Nevertheless, structural factors, such as populational ageing and other social risks, are indispensable when social welfare is concerned since they *are* what social policy is ideally meant to address; instead, what is up to institutionalism and agency to explain is rather *which* social risks the welfare state should tackle and *how*.

Gauthier (1996, 448-9) specifically identifies the following developments that challenged and thereby shaped family policies over the post-war 20th century: (1) demographic changes resulting from postponed fertility, rising divorce rates, female labour force participation, life course individualisation; (2) economic vulnerabilities of families resulting from job insecurity; (3) European market integration and (4) international economic integration processes, the former promoting social policy convergence while the latter intensifying interstate competition. These have all been direct challenges to the male breadwinner system that needed to be recalibrated in

order to accommodate new ways of organising family life and gender relations. Although there is still uncertainty about how these changing trends are sufficient of themselves to compel policy reform in any specific way, Gauthier makes a good point in drawing a link between female work participation and increasing childcare services as well as populational ageing and shrinking pensions.

Similarly, for Kamerman (2010), family policy is used to incentivise fertility and augment child health and living conditions while implicitly to regulate family relations and influence private decisions in work-family dilemmas. Social-economic conditions, political ideologies put aside, might factor into (de-)familisation—e.g., through pro-natalist family policies that incentivise childrearing. In line with Bonoli and Reber, this subsection identifies three major structural shocks that may compel governments in favour of family policy reform (i.e., either creating new instruments or redrafting old ones): low fertility, child poverty, and gender inequity. In brief, seconding these authors, this subsection argues that even though structural conditions, such as low fertility, are important causes for reforming family policy in general, they cannot explain ‘defamilising’ or ‘familising’ policies without taking account for politics and institutions.

In cases of vexing drops in fertility, pro-natalist family policies might be adopted, primarily meaning generous offerings of cash transfers to families in accordance with the number of children in the household (Rostgaard 2003). This evidently means universal allowances since the primary beneficiaries of these transfers are not necessarily the poor but fertile households of whatever income category or social class. Although that would mean that pro-natalism always qualifies as ‘familisation’, these benefits may well be complemented by childcare services, newly funded or pre-existing, which would resemble the French family policy model, comprised of both *stricto sensu* ‘familising’ and ‘defamilising’ elements (Martin and le Bihan 2007). Furthermore, policymakers might incorporate ‘defamilising’ elements into their pro-natalist agendas explicitly, where they

acknowledge Saxonberg and Sirovatka's (2006) and McDonald's (2000) theory that aggressively 'familising' policies tend to reach the opposite result in competitive, liberal market economies. In conclusion, although fertility considerations may incentivise family policymaking in general, they do not of themselves imply anything decisive to (de-)familisation.

2.3. Institutionalism(s)

Therefore, the devil lies in the details; and even though the causes for the necessity and/or demand for social policy are often exogenous, the policy response remains subject to endogenous factors, including institutional settings. According to Häusermann's (2018) state of the art review, this approach has looked at factors like decentralisation, state autonomy, power configurations and veto rules, path dependence and policy commitment problems. Though, these explanations do not necessarily discard the importance of political self-interest, ideology or structuralism to policy change: akin to Pierson's (2000) integrative approach, institutional configurations could be considered to be the drivers of individual actions and objectives that may still well be ideological motivated. In his *The New Politics of the Welfare State* (2001, 8-9), Pierson cites Bonoli in giving the example of how veto rules arising from state centralisation affect policy outcomes and entertains the possibility that ideological incentives may get more importance where "the rules of the game" procure unilateral policymaking capacity to ideologically motivated players. As opposed to, however, pure partisan theory, here ideological actors proceed in accordance with and to the extent of their power provided and maintained by the rules of the game.

Institutionalism, notwithstanding its multiple variants, above all looks at "procedures" guiding and directing decision-making, and often, constraining, or enabling, individual ambitions present (Immergut 2008, 565). Under this logic, public decisions (e.g., policies) are made, even in the most pluralistic systems, as such that distinctive, pre-existing interests brought beforehand to the democratic forum interact, blend, oftentimes fade, and change along the decision-making process

partly in the manner that the procedural rules, directly or indirectly, dictate (Olsen 2009). The most conspicuous institutionalist approach in public policy is possibly the majoritarian-consensus/proportional and the federal-unitary distinctions (e.g., Powell 2000; Lijphart 1984). Majoritarian political systems tend to aggregate public interests more intensively than proportional ones, meaning that their electoral and decision-making mechanisms are meant to define a powerful core (usually requiring 50% or more of the votes) facing an *ideally* competent opposition, while proportional systems do not have such a built-in aim, leaving it up to the frontrunners to build coalitions to rule. In addition, regarding sub-state relationships, the federal-unitary distinction is concerned with a quasi-spatial division of competences *within* the nation state, meant to characterise delicate systems involving self-rule, shared rule, and sub-state power asymmetries (see Bednar 2005; Watts 1998; Elazar 1987; Riker 1964). Still adjacent to these institutionalisms, upon mentioning power asymmetries, one cannot leave out the veto player theories that mostly originate from Tsebelis (2002) on key figures in decision-making processes from voting processes to coalition actions. All in all, political systems are although shaped and reshaped by actors over time, the way they change as well as the way actors seek to change it are largely contingent on the present rules of the game.

Echoing Häusermann's (2018) excellent literature review specifically on welfare regimes, one can distinguish between the Esping-Andersen's (1990) and Hall and Soskice's (2001) institutionalisms, the former relying on class structure and conflict (thus partly also power resources theory) while the latter on labour markets and cross-class worker/employer interests in explaining away social policy changes. Although the original articles for both of these approaches deserve criticism as to their methods and reliability, each has been an unwavering scholarly authority in their respective literatures that catalysed social policy research for years to come. Over time, Esping-Andersen's work has been questioned and refined either for its indicators of social policy or for the impossible claim that welfare state regimes could be grouped in three clusters and no more (see Bonoli 1997;

Mishra 1994; Sainsbury 1996; Lewis 1997; Fenger 2007; Bambra 2005; Ferrera 1996; Saxonberg 2013; Castles and Mitchell 1992; Iversen and Stephens 2008; Danforth 2014; Bambra 2007; O'Connor 1993). By contrast, Hall & Soskice's *Varieties of Capitalism* looks upon the welfare state as a tool to cushion the individual risks of investing in acquiring the qualifications that labour markets in coordinated market economies desire; in other words, social welfare has nothing to do with the politicised redistribution of the common good but serves as a risk pool or insurance against structural market externalities, such as unemployment, so that the economy can seamlessly run its course (Häusermann 2018).

No matter which theory is chosen, both hold a fairly predictable, rationalised worldview wherein actors play by the rules and change them to the extent those very rules allow it. For Pierson (2000, 812), although these institutionalisms do leave room to structures and self-interest, institutions (akin to Esping-Andersen) and corporations (akin to Hall and Soskice) may create self-enforcing, path-dependent processes and incentives over the course of history that render them fairly resilient to exogenous factors. As Häusermann (2018) writes, such “regimes are equilibrium theories, because they identify an interdependent and self-stabilizing network of institutions”.

Additionally to this, Congleton and Bose (2010, 28) in their study of social budget changes over the last century found that federalisms, parliamentarisms, and other constitutional designs greatly influenced the responsiveness of policymakers to the popular demand. Specifically, based on their dataset on 18 Western OECD states, they remarked that the post-war constitutional recalibrations, such as the elimination or the weakening of upper chambers in parliament, across the West reduced the number of procedural instances where veto players could bend policymaking for their own purpose as opposed to the public demand. Thus, their explanation for the growing social insurance budget in the 80s and 90s rests not merely on the pressing new social risks but also upon institutional and agency theories that highlight the actual decision-making process. In their analysis,

institutional rules that confer veto powers to individuals detach—to some extent—those very public officials from the need to answer to average voter demands and enable them to pursue a particular technical or ideological agenda (29).

3.4. Agency, Interest, Ideology

Although social policy has its technical sides, it is far from being an objective subfield of public decision-making—it is generally viewed as inherently political (Häusermann 2018). Two prominent explanations for this are *partisan theory* and *the power resources approach* (PRA), the former relating social policy changes to government ideologies while the latter thinking about it in light of the power positions of competing interests, such as those of labour and capital (Esping-Andersen 1990). Although PRA largely differs from partisan theory, it likewise focuses on the centre of political decision-making—e.g., governments, parliaments—in explaining away why the welfare state changes in a certain way. For example, Esping-Andersen (1990) views political parties and interest groups as the primary tools of labour mobilisation and thus counterbalancing capital. This means that both approaches would hold it likely that stronger social democratic parties in leadership position led to more welfare generosity (Häusermann 2018) while Christian Democrats lobbied for a transfer-based, family-biased, and less emancipatory social policy (van Kersbergen 1995). From the perspective of familisation, these expectations could be reformulated as that social democrats *in theory* should promise to cushion family related individual burdens via social investment (e.g., childcare) while Christian Democrats *in theory* should emphasise individual responsibility for the family and propagate policies that merely compensate for the income risks involved.

Partisan theory indicates that those whom we elect to government can shape macroeconomic policy in a way that fits their political ideology. Specifically, regarding social spending, the ‘right’ has been characterised as an efficiency-oriented political affiliation that promotes well-balanced

expenditures, and concomitantly a lower social budget; by contrast, from that perspective, the ‘left’ is defined in terms of welfare expansion in pursuit of social equity (Pestieau and Lefebvre 2018). In the course of, however, the social movements in the late sixties and Reaganite-Thatcherite neoliberal experience in the eighties-nineties, Bornschier and Kriesi (2013, 12) mark the gradual emergence of the New Left that would soon alienate significant worker votes by adopting middle-class tenets of social democracy and European integration. For them, the early populist right of the late nineties gained a foothold in Western-European politics precisely by vocalising opposition to pertinent labour market changes and the ethnic transformation of domestic populations.

Thereby, the ‘proletarianization’ of the political right and the ‘elitisation’ of the left have come to refine the traditional concept of the left-right political divide (Betz and Meret 2013, 107). Notwithstanding the apparent simplicity of this idea, there is a great divergence amongst scholars on the precise relationship of the ‘new’ right, especially the populist right, with the working classes. While Rydgren (2013) asserts that populists appeal to workers primarily, Kitschelt’s (1995) viral concept suggests that they are strategically positioning themselves on the political spectrum and emphasising, or deemphasising, issues in order to get a wider base of support—this is what he called the “winning formula”. According to this latter theory, on the far right, parties tend to address the working class as much as the entrepreneurial middle class—which means they seek to avoid tangible social policy questions upon which the two cohorts would disagree, and, even where they cannot, they approach it with an ethnocultural eye, such as through welfare chauvinism (for the link between the populist far right and social policy, see Kitschelt 2018; Rydgren 2007; de Lange 2007; Rovny 2013; Röth, Afonso, and Spies 2018; Fenger 2018; Enggist and Pinggera 2020; Afonso and Rennwald 2018; Rovny and Polk 2019; Otjes 2014; Betz 1993; Krause and Giebler 2019; Ketola and Nordensvard 2018).

On the one hand, in spite of the fact that populism explicitly promises to restore the fair balance of powers between the commons and the elite, the traditional left-right theory has remained somewhat resilient. Accordingly, given the alleged thinness of populism as an ideology (Mudde 2004), it does not propagate distinctive policies beyond the premises of traditional left and right agendas. In other words, the populist right should keep itself to a standard right-wing policy manifesto, bringing “efficiency and order” (Londregan 2008, 85) to the fore and rationalising the social budget; by contrast, the populist left should be most adamant on social justice and reallocating resources to those on the periphery (Rodrik 2017; Pestieau and Lefebvre 2018). Should the populist right still be required to have a worker-friendly stance on social welfare, as said above, it has been observed to promote chauvinism to exclude foreigners from the domestic system of benefits (e.g., Keskinen, Norocel, and Jørgensen 2016; Schumacher and van Kersbergen 2014; Kros and Coenders 2019).

On the other hand, the relevant literature ever more frequently finds them—the populist right—vocal on social justice and redistribution and speaking up along the lines of class. For Betz and Merel (2013, 107), the populist right parties “are today’s working-class parties” based on their analysis of Italian, French, Austrian, Norwegian, Danish, Swedish, Finnish, Flemish and Swiss examples (108-110). Although they reserve some credit to globalisation-oriented reasons for the proletarianisation of right-wing populism (in that Kriesi 2008; Bornschieer 2010)—which emphasise xenophobia, anti-elitism and protectionism—, they rather side with the view that these parties have consistently been promoting quite leftist social policies, only with an exclusionary accent. Furthermore, that the working-class finds itself to be of the primary interest of the populist right has grown to be a strong assertion in the past decade; whether or not they should be categorised as neoliberal-conservative or social-nativist is a different and still unsettled debate.

Family policy is particular within the numerous social welfare instruments because it is deeply situated in the intersection of economic functionalities and cultural preferences—just as much Pestieau and Lefebvre (2018) discuss social policies as well from a “pragmatic” angle as a “normative” angle, family policy is just as technical as it is susceptible to traditional gender roles, family values, and the normative distribution of tasks and obligations in the household. In this, structural changes, such as female emancipation and the rise of the service economy, play a crucial role, according to Bornschieer and Kreisi (2013), as they trigger such social value debates that concomitantly shape social policy and change socioeconomic relationships—e.g., female labour market participation fuelling demand for childcare and male-inclusive parental leave policies. Given the field’s susceptibility to cultural preferences, there is reason to exercise vigilance regarding the populist right-wingers running for public office who have been capitalising on the grievance of the “cultural modernisation losers”, primarily those on the manual labour market (2013, 14; Coffé 2013, 140).

In politics, there may be several movements and parties that may capitalise upon this grievance and once in power may actually influence the policymaking process. This partisan mechanism was observed by the first feminist scholars of the welfare state, finding, for example, social-democratic decisionmakers to be pushing for a dual-earner family model in Western Europe in the late 20th century; although Lewis (1992, 161) remarks that these developments were oftentimes disconnected from the feminist movements and female demands for policy reform.

In the end, there remain doubts about how individuals or groups of individuals once in power can actually reverse long-lasting processes and reshape social policy at their fancy, especially in the West. Negri (2021) for example using OECD social expenditure data (1985 – 2011) on 19 countries found that governments could *not* bend social policy in accordance with their ideological stances in the short term. Specifically, on matters of family policy, conservative views—e.g., the Christian

Democratic (van Kersbergen 1995; Daly 1999; Kaufmann 1989) or the populist right—on the part of government may or may not translate into observable policy outcomes. While there is a tendency to discard the idea of rapid, significant and ideologically driven changes in social policy in the West, Szelewa and Polakowski (2020), Orenstein and Bugarič (2020), and Saxonberg and Sirovátka (2006) point to Central-Eastern Europe to update our views on policy change.

Chapter 3. Case Study Methodology

3.1. Case Selection: Recontextualising the Problem to Central-Eastern Europe

This Thesis looks at Hungarian and Polish family policymaking developments for the reason that there has been a considerable convergence observed between how the two populist-conservative governments—Fidesz-KDNP in Hungary and PiS in Poland—keep approaching gender roles in society, fertility, and state responsibility in assisting childrearing (Orenstein and Bugarič 2020; Fischer 2020; Szelewa and Polakowski 2020). This similarity is particularly puzzling since, in spite of the communist past these countries do share, they had followed different family policy trajectories over the last two decades, Poland offering primarily means-tested, poor-oriented assistance while Hungary rather universal cash incentives and some childcare. What is observable, however, as of 2015, the time PiS first entered into power without a coalition partner in Poland, family policy spending skyrocketed, and cash benefit packages emerged in the country arguably inspired by the “family mainstreaming” programme in Hungary that had been running for five years by then (Félix 2020, 63). Given the coincidence of these ground-breaking reforms as well as the consonant gender politics of both populist governments, it is time to examine what we can expect from such parties in the future on the front of gender equality and family policy.

For the sake of clarity, the puzzling is not the way in which Fidesz and PiS—as well as various other conservative and far-right populist parties—speak in the same anti-genderist tone; the puzzling is that how ideology seemingly dictates a policy area that is meant to be responsive to socioeconomic conditions and needs (Kamerman 2010) as opposed to vague moralistic preconceptions. Scholars like (Saxonberg and Sirovátka 2006; McDonald 2000) observed quite early on that modern market conditions pose considerable constraints to the foreseeable effects of illiberal family and labour market policies, meaning that ideologues in power have a limited

room of discretion in social engineering gender relations if they actually want to make their citizens' lives easier.

Poland and Hungary apart from sharing main transition milestones—such as the 1989 liberation from under communist rule, allying with the IMF, World Bank, joining the European Union, etc.—and some socioeconomic features as to welfare and labour market structures, they also share a similar palette of social structures relevant to family policy shown by fertility rates, rising mean age of giving childbirth, female employment rates. Most importantly to the partisan hypothesis, both countries saw early on social democratic leadership which over the years has been taken over by the centre-right and as of 2015 in Poland and 2010 in Hungary, by the populist right (i.e. Fidesz-KDNP in Hungary and PiS in Poland). Furthermore, irrespective of the previous regimes, both right-wing populist governments have made significant changes to their countries' family support systems in order to boost reproduction and family formation—although it has not yet been established what these changes mean from the lenses of familisation. These similarities arguably facilitate an appropriate examination of whether familisation changes over time along the lines of partisan ideologies.

3.2. Units of Analysis & Measurements

Methodology in welfare state literature was rightfully characterised by Pierson (2000, 817) as intellectually pluralised, meaning that scholarship has been blossoming with divergent methods and approaches to the problems of social policy and that qualitative and quantitative investigations have been talking past one another. In that light, this Master Thesis jumps at the question of changes in familisation from both qualitative and quantitative angles. The main research question being 'whether and how the familisation outlook of a country changes over time' and whether these changes are political, structural-functional or institutional—or multidimensional—, the main hypothesis is (1.a.) that familisation and defamilisation trends unfold along partisan lines, and that

(1.b.) the populist right, by its emphasis on traditional family values and gender norms, make more familising policies than other political factions. This, I presume, is moderated by the institutional environment and power resources they manage to garner for themselves. Therefore, both these two preliminary assumptions are in line with partisan and power resources theory, measurable by the number and political influence of pro- and contra familisation actors over time. Nonetheless, power resources theory offers further explanations beyond the scope of Hypothesis 1, also taking into account interest groups and unions' political lobby as exercising policy influence, such as women in decision-making positions, labour unions and parties, employer lobbies. Other explanations, based on the literature review above, may also be found in (2) structural-functional policymaking theories, such as (2.a.) the logic of industrialisation and (2.b.) globalisation/internationalisation; and in (3) institutional models, such as (3.a.) path dependency, and (3.b.) the varieties of capitalism and skill-specificity.

This Thesis offers a cross-sectional comparative case study, wherein the cases themselves are CEE states (i.e. Hungary and Poland) at given points of time, while the units of the analysis are primarily governments and policymakers on matters of family and care related social policies. To decide upon the merits of the first hypothesis (H1), under each government, *I measure the familisation landscape as well as how it changed under the rule of each leadership, contrasted against the self-proclaimed ideological position of each party as well as other non-partisan explanations.* In line with institutional considerations, I account for also (1) the number of chambers involved in policymaking, (2) the share of votes of government in each chamber, (3) the ideological distance between the coalition partners, furthermore (4) the share of votes of opposition parties, and (5) their ideological distance. For the sake of clarity, the Hungarian governments examined here are

- Orbán I. (1998-2002),
- Medgyessy (2002-2004),
- Gyurcsány I. (2004-2006),

- Gyurcsány II. (2006-2010),
- Orbán II. (2010-2014), and
- Orbán III. (2014-2018),

while the Polish governments (Heads of State in [] brackets) examined are

- Buzek [Kwasniewski] (1997-2001),
- Miller [Kwasniewski] (2001-2005),
- Marcinkiewicz [Kaczynski] (2005-2007),
- Tusk I. [Kaczynski] (2007-2011),
- Tusk II. [Komorowski] (2011-2015), and
- Szydło-Morawiecki I. [Duda] (2015-2019).

In order to ascertain whether Hypothesis 1 has credits in explaining familisation changes, one must examine alternative explanations provided by non-partisan theories, including other facets of power resources conditions (i.e., women in policy leadership), as well as structural and/or institutional factors that might drive the forces changing family policy over time. The two following sections do exactly that: section (1) sets out in details how familisation is to be measured across the pages while section (2) lists the various independent variables, including alternative explanatory variables, that may factor into policy change.

3.3. Measuring (De-)Familisation

Since there has been fairly little investigation on the changes in familisation and by contrast ample theorisation on its definition (e.g., Leitner 2003; Leitner and Lessenich 2007; Lohmann and Zagel 2016; McLaughlin and Glendinning 1995; Lewis 1997; Sainsbury 1996; Orloff 1993; Lewis 1992; O'Connor 1993; Mathieu 2016), there is a wide yet often self-contradictory palette of

conceptualisations while few workable indicators. Based on the operationalisations of Lohmann and Zagel (2016) and Leitner and Lessenich (2007) presented in the previous chapter, I approach familisation from three main policy areas each comprising (a) cash transfers, (b) social services, and (c) regulations (e.g., parental leave policy for childrearing, or obligation to care for elderly). This echoes these authors' operationalisation summarised by the table below.

In line with the operationalisation detailed above, each country profile below regarding defamilisation/familisation is organised into (1) expenditure, (2) policy, and (3) outcome, in order to avoid conflating aspects of familisation that may not have equal weight in the assessment. This is because while Esping-Andersen (1999) used quantitative indices mostly regarding spending, Leitner (2003) and Saxonberg (2013) looked at leave and eligibility, and Leitner and Lessenich (2007) went as far as to consider the alleged consequences of family policies, such as social familisation. In that light, it is a must to pull apart the concept into more understandable elements, which I named *expenditure*, *policy* and *outcome*. In the country profiles provided below, each account of defamilisation/familisation is organised into the following sections:

- (1) *Expenditure* sections look at strictly only the per-GDP spending on family support items (cash and social service) over time;
- (2) *Policy* sections look at (2.1) briefly the policy rhetoric where relevant and (2.2) the size, eligibility, and other features of cash benefits and leave policies that are by nature dependent on regulation;
- (3) *Outcome* sections look at (3.1) childcare coverage and (3.2) other circumstantial features of society that may or may not demonstrate longitudinal trends in, for example, female employment, household earning models, etc. These are primarily characteristics that do not or only to a certain extent depend on government regulation and policy.

Table 2 Family Policy Indicators Used in the Case Studies

| Group | Theme | Indicator | Types | Measurement Units | Source |
|-----------------------------|---------|---|---|--|---------------------------------------|
| Familisation by Expenditure | General | Social Expenditure | (1) Cash (2) Kind | (1) Per Current GDP (2) Per Capita in Constant USD ¹ | OECD, Society at a Glance 2019 (2019) |
| | Family | Public Expenditure on Family | (1) Cash (2) Kind | (1) Per Current GDP (2) Per Capita in Constant USD | OECD, Society at a Glance 2019 (2019) |
| | Family | Leave Support Expenditure | None | (1) Per Current GDP (2) Per Capita in Constant USD | OECD, Society at a Glance 2019 (2019) |
| Familisation by Policy | Family | Childcare Obligation after 3 Years of Age | None | ▪ Yes / No | Regulation |
| | Family | Family Allowance Entitlement | None | ▪ Universal / Means-tested | Regulation |
| | Family | Childcare Source | (1) Public (2) Private | ▪ Percentage of Childcare Facilities | National Statistics Offices |
| | Family | Leave | (1) Maternity (2) Parental (3) Homecare | (1) Paid Weeks Available to Mothers (2) Maternity Benefits (3) Paid Weeks Available to Fathers (4) Paternity Benefits (5) Unpaid Weeks Available to Mothers (6) Unpaid Weeks Available to Fathers | Eurostat |
| | Family | Net Transfer Differences between Dual-Earner and Single-Earner Families | None | Change as Percentage of Net Transfers from Single-Earner Household | OECD, Society at a Glance 2019 (2019) |
| | Elderly | Obligation to Care for Elderly | None | Yes / No | Regulation |
| Familisation by Outcome | Family | Childcare Coverage | (1) Age: 0-3 (2) Age: 3-6 | Percentage of Children Covered | Eurostat |
| | Family | Spouse Employment | (1) 0 child (2) 1 infant (3) Female (4) Male (5) Fulltime (6) Parttime | Percentage | Eurostat & OECD |

¹ In Constant (2015) USD

3.4. Assessing Partisan Influence and Exogenous Factors on Family Policymaking

In light of the above, when assessing partisan influence on family policymaking within Hungary and Poland as well as across the two countries, the factors listed by the table below ought to be accounted for. Primarily, each within-case and cross-case comparisons are delivered along the following lines. Firstly, one can only establish partisan-ideological influence on policymaking where there is sufficient difference between government ideology and that of the opposition. In other words, a centre-right government's policy repertoire could hardly be associated to its own agenda where the opposition parties reside mostly at the centre as well—for that I appreciate the ideological distance in parliament under each government in the case studies that follow.

Government Ideology

| | | |
|----|---|-------------------------------|
| 1. | Ideological Distance between Left and Right | /significant or insignificant |
| 2. | Form of government | /single-party or coalition |

Secondly, provided the ideological disparity within the chamber(s), I also look at the ideological leverage a party/coalition in government exercises as well as the electoral system. These considerations are crucial when one seeks to pair policy promises with actual policy decisions because, under certain institutional constraints, such as a powerful opposition, governments may not be able to accomplish everything it had aspired to. Thirdly, the table below lists not only factors, such as the political strength of competing ideas but also more holistic, structural-institutional factors, such as Europeanisation prospects and the labour market dynamics.

Forces Constraining Government Ideology

| | | |
|----|--|---------------------------------------|
| 3. | Share of government in chamber | /percent of seats |
| 4. | Share of parties with similar ideology | /percent of seats |
| 5. | Share of parties with dissimilar ideology | /percent of seats |
| 6. | Women's participation in the chamber(s) | /percent of seats |
| 7. | Women's participation in the leading block | /percent of leading block members |
| 8. | Women's participation in government | /percent of all ministerial positions |
| 9. | Europeanisation prospects | /significant or insignificant |

Chapter 4. Findings

The analysis is organised into two comparative and two case study sections. The first one, *Shared Pasts and Different Directions*, sums up the immediate post-transition trends in Hungary and Poland in the late 90s to demonstrate in what ways they resembled and differed from one another as early as the 1989 regime change. The second section, *Familisation Landscape over Time: Hungary*, examines family policy changes over the last 5 governments since 1998 along the distinction between spending, policy, and social conditions. The third section *Familisation Landscape over Time: Poland*, proceeds the same way, involving the last 6 post-1989 governments. Finally, the fourth and last section under this chapter contrasts the country studies to determine key similarities and differences in Hungarian and Polish familisation patterns as well as how these differences changed under populist-conservative leadership.

4.1. Shared Pasts and Different Directions

On the most fundamental level, I must define the political context in which Hungarian and Polish laws and policies are made: (1) both are unitary democratic republics with extensive but revokable decentralisation of social policy to municipalities; (2) Hungary is a parliamentary system with a mixed (rather majoritarian) voting system and Poland is a semi-presidential system with a proportional voting system; (3) the Hungarian legislature is unicameral while the Polish is bicameral, wherein the lower chamber (*Sejm*) can overrule the Senate by majority vote; (4) the legislative power is vested in both the government and parliament.

In the communist times, family policy, although existed, was far from being a public service and rather resembled a state instrument to engineer social reproduction and the division of labour amongst the two genders (Fodor et al. 2002, 479). In spite of the typically universal obligation to work, in other words the absence of the right *not* to work, women were granted extensive leaves

from the workplace, that would usually not terminate before a child's third year of age, which concomitantly meant formal infant care was generally unavailable within that period (ibid, 480). Given that economies such as these were fairly isolated from market-like factors, such as employer interests, the re-entry into the labour force was considerably stable and unburdened. It goes without saying that family policies under such regimes did not grant fathers the chance to leave work to perform childcare themselves; society at that time was deeply vested in gendered preconceptions of duty, hard work being that of men, childrearing (added to hard work) being that of women.

The face of family policy, mainly its operation and its normative aims, went through a stark change after the fall of the soviet regime: social expenditure and state provision shrank, family policy transformed from a social engineering tool to a service gradually outsourced to the market (481). At once, the *market economy* unfolded setting a considerably different ground for working individuals to subsist on: numerous jobs disappeared, employment became unguaranteed and skill based, unemployment and poverty plagued the first years of transition (Lauzadyte-Tutliene, Balezentis, and Goculenko 2018; Basten and Frejka 2015; Saxonberg and Sirovátka 2006; Rostgaard 2003). It is crucial too to acknowledge regarding social rights and policy that in both Hungary and Poland labour unions crumbled (Greskovits and Bohle 2001) and remain fairly powerless. Specifically, what these new factors brought about regarding the family was the plummeting fertility rates and marriage and childbirth postponement that have been fairly similarly patterned in Hungary and Poland (see the figure below). In addition to that, both in Hungary and in Poland labour market conditions have been as such that part-time occupations are the scarcest as compared to the rest of the Union, which poses a significant structural threat to work-family reconciliation efforts, and concomitantly, reproductive attitudes (Karacsony and Milan 2017). This has been also due to the intensive neoliberal governance in the first decade following the transition, advised by the World Bank and the International Monetary Fund, where governments prioritised

stabilisation and economic opening (Derviş, Selowsky, and Wallich 1995) rather than social welfare, thus downsizing the family support system under that very pretext.

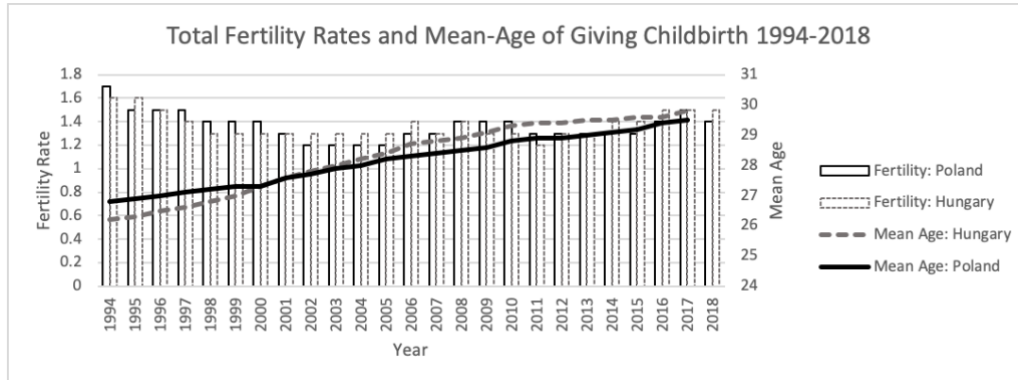


Figure 1 OECD Social Indicators, Family. Variables: SF2.1 Fertility rates, SF2.3 Age of mothers at childbirth.

Another similarity, with no question, is the prospect and, eventually, the fact of joining the European Community in 2004, which had been preceded by multiple soft social policy requirements, like the Barcelona 2002, that were unseen before from the part of the IMF and the World Bank. Although admission may have been a more political than a policy-technical decision, and even though policy convergence has been slow, Europe has had considerable importance on the policy discourse (e.g., Duman and Horvath 2013).

Despite, however, the so often universalistic view on Central Eastern European welfare states and the relevant social conditions (Saxonberg and Sirovátka 2006; Orenstein and Bugarič 2020; Rostgaard 2003), there is a striking difference between how the two countries studied here approached these post-transition risks over the years. For Szelewa and Polakowski (2008, 129), they even are direct opposites of one another, Poland hosting a residual, means-tested system of support while Hungary a generous and comprehensive welfare regime. Indeed, based on the post-soviet transition experience, analysts could at ease claim that “the Polish state does not interfere with the childcare choices of families” (Safuta 2011, 82), while the Hungarian one hectically

changed back and forth between socially engineering the family's behaviour and simple poverty reduction and reconciliation. These differences, however, mostly endured up until 2015, the year where Poland followed Hungary's right-wing family policy in falling under populist leadership.

4.2. Familisation Landscape over Time: Hungary

The following section maps out KSH², OECD, and Eurostat longitudinal data on family policy in a manner that echoes our distinction above between (1) familisation by expenditure, (2) familisation by policy, and (3) familisation by outcome.

4.2.1. Familisation By Expenditure

Based on Hungary's expenditure data (OECD 2019a) divided into cash and service family spending, one can estimate already the familialistic tones by examining the ratio between the periodical changes in these two units of spending. Figures (...) and (...) below show exactly that: the first one the percentage of change in cash and service spending as compared to the previous year and the second one such percentages aggregated into the government terms.

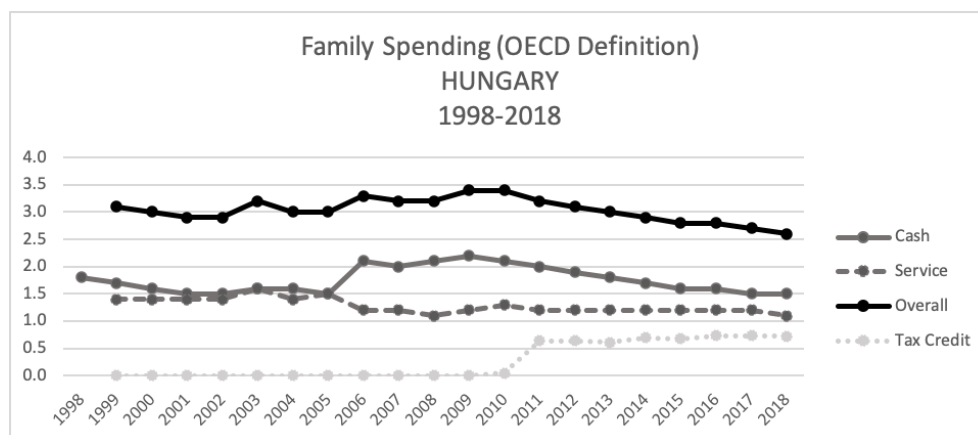


Figure 2 OECD Family Indicators Database. Measurement: % of current GDP.

² Abbreviation for Központi Statisztikai Hivatal ("Central Statistical Office")

As compared to the CEE region, Hungary's welfare system has been one of the most generous (Szelewa and Polakowski 2008), yet the country's familisation patterns have been hardly as generalisable. In harmony with the observations that immediate post-transition strategies followed neoliberal economic tenets (Fabry 2018), change in family spending around the late 90s was virtually incremental if not negative. According to Gyarmati (2008, 385), the Hont administration (1994-1998) established the strictest family policy framework in the country's history: under the pretext of stabilising the economy, several benefit systems were to be converted into social insurance schemes or means-tested support targeting exclusively the worst off. Eventually, the Constitutional Court abolished a great part of these policies for their extremity, yet several others remained in force, such as the abolition of GYED (*ibid*).

The first Orbán government, as explained in the following section, was although an active and vocal leader on family policy, specifically in softening the benefit eligibility requirements, it had not enacted any significant budget plans in this policy field and kept the spending rate stagnant—see table below. By contrast, certainly due to the ambitious prospect of joining the European Union as well as due to the ideological shifts in the political elite, Hungary saw a significant rise in family cash expenditure under the first social-democratic government (2002-2006) followed by an ideal-typical defamilising policy package under the second one (2006-2010³). Upon the return to power of the populist-conservatives, as the OECD (2019) figures show, there has only been a slight decrease, save regarding the tax breaks that have grown to be a distinctive feature of the post-2010 welfare system in Hungary (...).

³ In 2009, the Gyurcsány cabinet resigned amidst a political upheaval and an interim cabinet took over led by Gordon Bajnai.

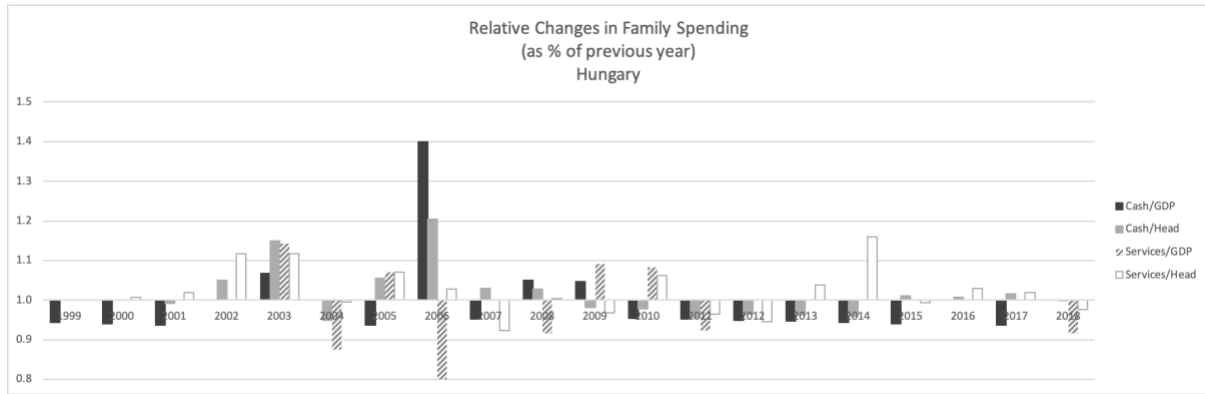


Figure 3 OECD Social Expenditure Database. Measurement: (1) Per GDP: % of current GDP in HUF and (2) Per Head: constant GDP per capita in 2015 USD. Notes: 1 means 100%, therefore no change.

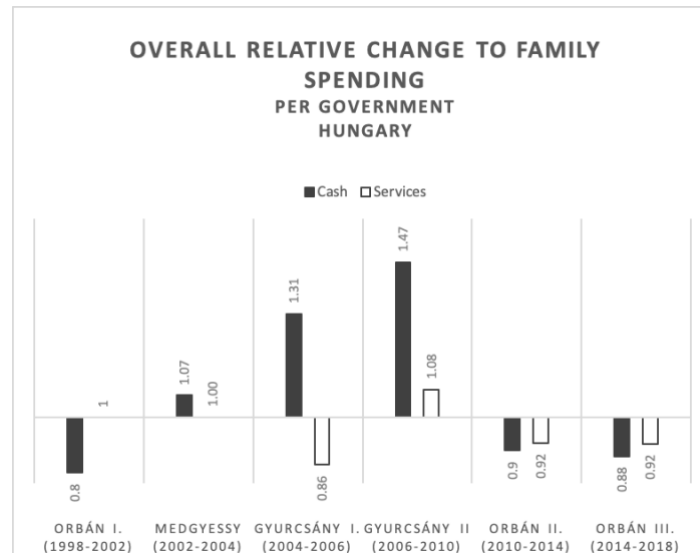


Figure 4 OECD Social Expenditure Database. Measurement: % of current GDP in HUF. Notes: 1 means 100%, therefore no change.

Overall, expenditure does not tell much about the nature of the policies enacted but it occupies an important role in helping us acquire a full picture of the periodical changes in the field of family policy over Hungary's democratic past. Especially when we spectate figure (...) above, the aggregate data points offer a very visual indication of the loci of the major budget reforms in history. In the case of Hungary, that is mostly the social-democratic era where we see such events, while under the right-wing conservative periods, the family budget is surprisingly in moderate

decline—which becomes an astounding fact when one discovers how central family policy has been to the populist-conservative Fidesz-KDNP regime over the past decade.

4.2.2. Familisation By Policy

In order to be able to examine government decisions in the field of family policy, it is imperative to know what policy context incoming leaders inherit, and for that, I also dedicate a paragraph to explain Hungary's first two neoliberal governments before 1998, whose policymaking was of great *negative* inspiration to the subsequent Fidesz-FkGP-MDF governing coalition.

Regarding regulation and policy decisions, Hungary's first elected government despite its heavily neoliberal agenda introduced a number of significant cash benefits to be offered to prospective mothers during leave: most importantly, the *gyermekvédelmi támogatás* (GYET) was introduced specifically targeting mothers of at least three children. In the immediate transition period, under the Antall (1990-1994) and Hont (1994-1998) governments, most benefits were means-tested and social insurance like benefits requiring prior employment and substandard family income (Spéder, Murinkó, and Oláh 2017, 9). Childcare, at the same time, was delegated to local governments in a framework where the national state apparatus is only responsible for the regulation of service provision and subsidising the facilities (OECD 2004, 16). Specifically, under the Hont administration (1994-1998), the *gyermekgondozási díj* (GYED) was gradually phased out while the originally universal GYES was reconfigured as such that it supported different income groups differently, favouring the poor (Gyarmati 2008, 385). The GYET and the family allowance (*családi pótlék*) went through the same reform. Most importantly, the GYES as opposed to increasing with the number of children in the household transformed into a fixed sum benefit detached from family size (ibid). In light of Gyarmati's (2008, 386) remarks on this period, policymakers prioritised an efficient and focused family policy that provided residual support to those on the social periphery, no one else. Given that this system regarded social policy as a toolbox of aid

rather than income replacement and work-family reconciliation, we can characterise it overall as implicitly familising (Leitner 2003) for leaving families alone in making ends meet and rendering work-family reconciliation ever more difficult.

Once the first Orbán government assumed leadership in 1998, social policymaking changed significantly in terms of practice but also ideology. As opposed to the residual welfare policies in the first ten years of transition, the right-wing Fidesz-MDF-FkGP coalition propagated in favour of a family policy that is by function a social engineering instrument that goes well beyond poverty concerns (see also Gyarmati 2008, 388). This proposal was backed up with an ideology standing in stark contrast to the neoliberal social policymaking of the early 90s: Fidesz transformed the poor-centred family politics of the past into an abstract, normatively loaded ideology that viewed society as a network of families whose tax is not to be redistributed to the poor but to insure against income loss involved in childrearing (Fidesz Party Programme 2002, II. 17-20). In that social insurance concept, ‘motherhood’ and ‘home care’ also acquired an imperative role in policy rhetoric, intended to praise self-sufficiency of the family in caring for its own members and to equate the nobility of paid work with that of unpaid family care at home (Fidesz Party Manifesto 1998-2002, 3). As Gyarmati (2008, 388) rightfully observes, the Fidesz-led coalition was the first government in the country’s democratic history to enact a unique and consistent legislation on the state support of families (i.e., Law of 1998 no. LXXXIV on family support). During the four-year-term, amongst others, policymakers reinstated the GYED as an employment-based benefit, universalised the GYES and made it progressive to the number of children in the household, re-universalised the family allowance (*családi pótlék*), and reintroduced the family tax benefit (Ignits and Kapitány 2006). Furthermore, the government although restored the universality of the family allowance, it also restructured it in two ways: (1) firstly, the allowance was divided into two instruments one specifically addressing the pre-school period of childrearing and the other, thenceforth conditioned on student status, the schooling period up until the age of 18 or, in case

of higher education, for the duration of the child's financial dependence on the family; (2) secondly, the size of the allowance differed based on family type, the number of dependent children and their health (ibid). At the same time, low-income families were not eligible to the respective tax benefits; instead, they could apply for state aid that equalled to 20 percent of the all-time pension minimum (Gyarmati 2008, 389). Regarding parental leaves, working fathers were statutorily granted a 5-day absence benefit strictly immediately after the birth of the child—other policies resembling paternal leave are absent under the first Orbán administration. All in all, as compared to the preceding Hont administration (1994-1998), the Orbán leadership brought a considerable shift of focus from social equity onto assisted reproduction that, although promised—in vain—stay-home mothers more part-time opportunities, technically instated a two-faced system where work and family were particularly irreconcilable for the worse off (ibid). In that light, I regard the 1998-2002 governance as an example of optional familisation that primarily encourages home care and income replacement as opposed to formal childcare, but which also values, and favours paid work as a social virtue.

Akin to its predecessors, the social-democratic Medgyessy government (2002-2004) promoted the concept of an active welfare state that, as opposed to elevating citizens from poverty, rather takes charge of a broad range of tasks relevant to the everyday lives of its citizens. However, by contrast to the Christian right-wingers once in office, the MSZP-SZDSZ coalition was also vocal on female employment and work-family reconciliation, including formal childcare, which have been fairly absent or deemphasised beforehand. With such predispositions, the centre-left coalition reunified the family allowance and abolished the schooling requirement, introduced the 13th month of family allowance payment, raised the size of childbirth support (*anyasági támogatás*) from 150% to 225% of the all-time pension minimum, and extended GYES eligibility to grandparents (Ignits and Kapitány 2006). Another striking contrast to the previous government was, according to Gyarmati (2008, 391), that the social democrats defined child poverty as a central national concern, shedding

light upon the previously discarded principle of redistributive justice. As previously seen in the *Expenditure* section, the Medgyessy administration has indeed boosted spending that was in stark contrast to the first Orbán government; however, in the wording of the policies, Gyarmati (2008, 392) rightfully observes a surprising similarity between the two in equating stay-home motherhood with paid work and morally encouraging family self-sufficiency and high fertility. Overall, I still categorise the performance of the Medgyessy government (2002-2006) as something between optional familisation and defamilisation for the following reasons: (1) it officially introduced wage-protected paternal leave of one week (i.e., defamilising); (2) made grandparents eligible to homecare benefits and extended income replacement instruments (i.e., *stricto sensu* familising, but based on the literature, it is not obvious); and (3) somewhat managed to develop early childcare facilities (i.e., defamilising), daycare being made compulsory from the age of 5 (Blaskó and Gábos n.d.). It must be stressed, however, that around middle 2004, the Medgyessy cabinet resigned amidst a political turmoil and Ferenc Gyurcsány formed an acting government for the remainder of the term.

Somewhat faithful to the ideology of the MSZP-SZDSZ party coalition, the Gyurcsány government (2004-2006) and (2006-2010) reoriented the family policy landscape to address social concerns such as poverty and acute existential needs (Gyarmati 2008, 393). The law of 2005 no. CXXVI on the amendment of the family support system as well as the law of 2005 no. CLXX on the amendment of the law of 1993 no. III on social organisation and social service doubled the size of the family allowance, restricted tax benefits to caretakers in a family with less than 3 children or with no eligible financial need, merged GYET into the family allowance, allowed mothers on GYES to undertake employment as of the child's first birthday, and recalibrated social aid instruments in a way that granted the most to the poorest progressively (ibid). At this time, however, childcare was undiscussed, and the government only stepped up on the issue of reconciliation after its re-election in 2006. Overall, MSZP policymakers viewed child health and

wellbeing as well as work-family reconciliation as the primary objectives of family policy (Ignits and Kapitány 2006). The law of 2006 no. CXVII on the amendment of miscellaneous social policies, amongst others, reindexed the size of the family allowance to the inflation rate, capped the extent of social aid in order to prevent discouraging re-entry to the labour market, and disallowed double eligibility to GYES and social aid at the same time (see more in detail in Gyarmati 2008). Both in message and in practice, the Gyurcsány government adhered to the same social justice principles as its predecessor and reshuffled the policy landscape in a way that catered to needs and reconciliation concerns. For that reason, echoing the observations in the previous *Expenditure* section, I categorise the Gyurcsány I. (2004-2006) as implicitly familising for withdrawing benefits and neglecting childcare, while the Gyurcsány II. (2006-2010) as the most defamilising in the country's democratic past. It must be stressed, however, that this assessment does not include the last year of the MSZP leadership, namely when the government coalition crumbled and an acting cabinet took charge of promptly reshuffling the economy, including family policy, to cushion the impacts of the unfolding financial crisis of 2008-2009. Although some momentarily important changes were made during that time, such as the reduction of the wage-protected parental leave from 3 to 2 years, they were swiftly undone by the right-wing populists that would later on obtain super-majority in Parliament.

In 2010 commenced its operation the second Orbán administration (2010-2014) that would embark upon the same family policy agenda that it had left off in 2002 when it became opposition. The rhetorical focus thereupon shifted again, this time from social justice and redistribution onto national reproduction, not only propagating for a family reward system to incentivise childrearing but also for a family structure that the regime deemed appropriate (Raţ and Szikra 2018; Inglot, Szikra, and Raţ 2012). Visible also in the previous section, the family tax benefit progressive to the number of children was revived to assist middle class families as opposed to the poor (National Audit Authority of Hungary 2021, 8). This is visible also in the fact that the GYED (a salary-based

benefit) would be consistently reindexed according to the inflation rate while the family allowance and the GYES would not and thus would gradually lose their real market value (Inglot, Szikra, and Raţ 2012). In contrast to the conservative, culturally belligerent soundbite of the regime, the law of 2011 no. CCXI on the protection of families does introduce the entitlement of working parents against the state to receive state support regarding childcare during the day (see in §4(1) of the law)—although that does not of itself mean formal childcare. Nonetheless, upon remaking the GYES from two to three years, policymakers also restricted the permissible number of weekly hours of work for benefitting parents from 40 hours to 30 hours (Gyarmati 2008). Moreover, the Fidesz-KDNP was reluctant to lengthen the 5-day-long paternal leave that originated from the Medgyessy government. Overall, the second Orbán regime's family policies could be divided into two programmes in 2010 and 2012, both of them mainly conferring tax cuts and fixed-purpose benefits, such as housing supplements (National Audit Authority of Hungary 2021). In that light, taking account for the policy rhetoric and the sequence of the most important policies enacted during this term, I categorise the Orbán administration (2010-2014) as explicitly familising because of the impressively disproportionate ratio between fiscal incentives to home care and formal childcare and paid maternal leave policies that only guarantee state support if the parent (usually the mother) does no or limited paid work on the side.

Under the third Orbán government (2014-2018), the GYED, a salary-based benefit that originally did not permit mothers to undertake work while receiving, was reformed to allow mothers to work as of the first birthday of the respective child, similarly to what the Gyurcsány government did to the GYES. At the same time, in case of more than one child in the household, it was now permitted to receive GYES and GYED simultaneously (OECD 2020). Additionally, this government introduced the graduate GYED granting the statutory minimum wage to mothers (not fathers) studying at university (ibid). Moreover, following another sequence of reforms in 2016, one could now benefit from the GYED and work full-time if the respective child was more than six months

old. Again, it must be stressed that only those who had employment status of at least one year before applying were eligible for the GYED. At once, and surprisingly so, the Fidesz-KDNP cabinet initiated a considerable childcare expansion project followed by a regulation making it compulsory as of 2015 for parents to enrol their children between 3 and 5 years of age in daycare institutions—previously it was 5 years of age (OECD 2020, 13). For children under the age of 3, *mini bölcsődék* (infant care facilities) were introduced by the law as another type of childcare service that remained optional to parents and, as the OECD (2020, 15-16) reports, barely available. As of 2017, local governments, the main childcare providers, were mandated to make available childcare facilities if there were at least 40 children under the age of 3 living on their territory or if at least 5 families requested it (OECD 2020, 13). Furthermore, every parent caring after a child under 3 years of age was granted the right to part-time work that, although meant 4 hours of work per day, one could demand from one's employer (ibid). Around the end of their term, the government initiated another childcare expansion programme, although it must be stressed that formal childcare is still not provided on the national level, and local authorities bear the most discretion as well as the most responsibility regarding the execution of this social service (OECD 2020, 16). In the light of the above, I find the third Orbán administration (2014-2018) to have taken significant steps away from explicit familisation towards optional familisation during this term and to still have failed to live up to the standards of defamilisation for the following reasons: (1) although it had offered the chance for mothers to take up work on the side while on leave or receiving family benefits, (2) the part-time labour market is minuscule in Hungary (OECD 2020, 19) and (3) full-time employment is greatly disincentivised by the novel family tax credit system that has shifted towards favouring single-earner households more and more over the years (OECD 2019b, PF1.4).

4.2.3. Familisation By Outcome

This section looks at (1) childcare availability/coverage and (2) miscellaneous female employment indicators that were at least theoretically mentioned in gendered welfare state literature on

defamilisation (...). In Hungary, the most important feature of the childcare system is that similar to the communist times relatively few children have been enrolled under 3 years of age in early childcare facilities. The most intuitive explanation to this may be found in the consistently long maternal leave period that, except for the time under Bajnai's acting cabinet in 2009, has always been 3 years. This explains also why maternal employment is so starkly different for mothers with children under 2 and with children above 2 (figure 6). This, however, does not account for the number of the respective children, the increase of which would most intuitively make these numbers converge.

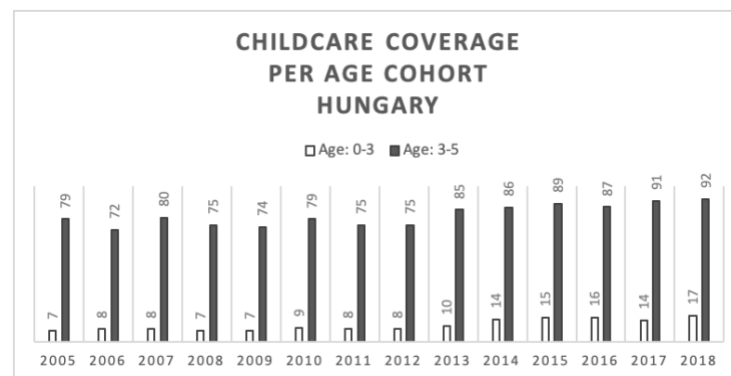


Figure 5 Eurostat, *Income and Living Conditions*. Variable: *Formal Childcare by Group (ilc_caindformal)*.

Although this specific measure is only available as of 2005, it nevertheless provides a striking image about the changes in coverage rates (including private as well as public), most surprisingly indicating that as opposed to the meagre ups and downs between 2005 and 2010 (of about 1 % regarding children under 3), during the Orbán III. (2014-2018) term, childcare coverage rates both for children under 3 and above 3 mounted significantly. The most immediate explanation for this may be found in the aforementioned childcare expansion programmes initiated by the Orbán III.

(2014-2018) that played an imperative part in bringing the regime closer to, although not at all near, defamilisation.

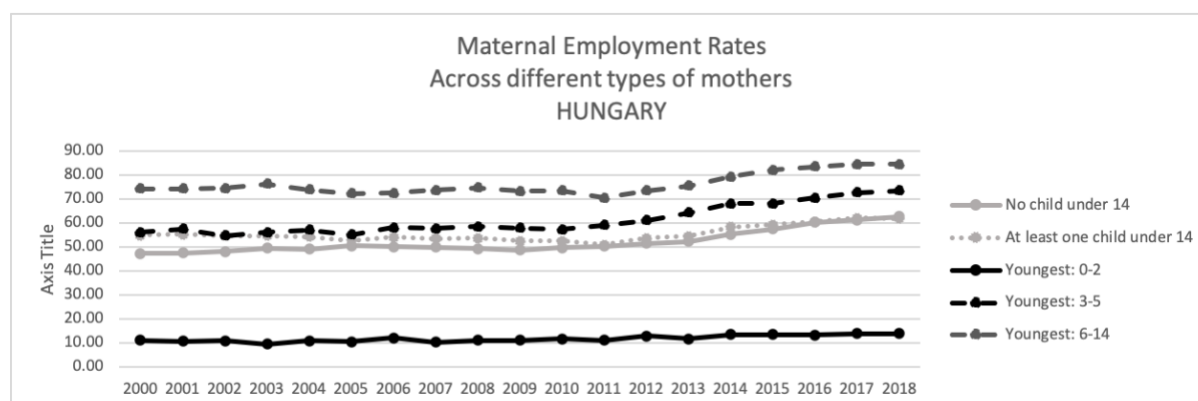


Figure 6 OECD Social Indicators, Family. Variable: LMF 1.2.C Maternal Employment by Age of Youngest Child.

All in all, Hungary's most important childcare-related characteristic is the fact the three-year-long maternity leaves inherited from the late communist era, paired with a country-wide aversion against working full-time and raising a two-year-old (see in European Commission 2013, 12), allow for the situation in which the ratio between the covered under-3-year-olds and those between 3 and 6 is around 1 to 7, and in which early childcare remains a fairly unavailable a service (Blaskó and Gábos n.d., 6). Overall, in light of familisation, childcare coverage has not at all fallen over the past decade, yet it must be stressed that the coverage itself is not all that directly linked with policy decisions. The Hungarian childcare systems although is overwhelmingly public-sourced, it is highly municipal as to the execution, and the central government mainly define the formalities and standards of the service provision and prescribe subsidy (OECD 2020). Therefore, one cannot merely claim that the rising childcare coverage rates are the product of a defamilising regulatory attitude because it is a delicate matter of also service quality and responsiveness to public demand. Notwithstanding the complexity, it is a must to recognise the increase in coverage between 2012 and 2018 which, given also the aforementioned policy objectives of the Orbán III. (2014-2018) cabinet, is seemingly due to the governments surprising steps away from explicit familisation.

4.2.4. General conclusions

This section briefly sums up what students of (de-)familisation can extract from Hungarian welfare politics and presents three potential explanation that could theoretically complement, if not replace, the idea that it is all about party ideology. These three considerations are: (1) institutional constraints, (2) women's share in decision-making, and (3) Europeanisation. As provided above, should welfare politics on family support be an ideological battle, what leaders can do is *in theory* always predetermined by (1) the ideological leverage they enjoy in legislative chambers, (2) the number of interest groups in decision-making capacity (e.g., women regarding family policy), or (3) major international trends, pressures and goals that transcend 4-year-long terms of government (e.g., Europeanisation).

4.2.4.a. *Ideology and Partisanship*

The Hungarian familisation-defamilisation landscape has been torn in between two largely partisan preconceptions as to the function of family policy—i.e., right-wingers prioritising reproduction and social engineering, while left-wingers poverty reduction and reconciliation. Despite that policy objectives are so distinctive to each political family, when it comes to the actual policies enacted, there may occasionally be convergence between the left and the right ideas (e.g., Orbán I. and Medgyessy both encouraged motherhood) or even dissonance between what has been said and done by policymakers (e.g., Orbán III. boosting childcare). The table below summarises these per-party categorisations in Leitner's (2003) conceptual framework, shedding light on the nuances of the partisan differences in familisation. It primarily demonstrates two things: (1) that there has been a qualitatively significant left-right parity in family policy ideas, and to some extent, actual policies, but also (2) that policy actions can often be different from the promises and put the policymaker into a different light when familisation is concerned.

Table 3 Familisation Typology per Government

| Cabinet | Expenditure | Policy | Childcare rate |
|---------------|-----------------------|--------------------------------------|----------------|
| Orbán I. | Implicit Familisation | Implicit Familisation | - |
| Medgyessy | Implicit Familisation | Defamilisation/Optional Familisation | - |
| Gyurcsány I. | Explicit Familisation | Defamilisation/Optional Familisation | No change |
| Gyurcsány II. | Optional Familisation | Defamilisation | No change |
| Orbán II. | Implicit Familisation | Explicit Familisation | No change |
| Orbán III. | Implicit Familisation | Optional Familisation | Increase |

Table 4 Party Characteristics and Share in Parliament

| Cabinet | Party / Coalition | Cabinet Share | Share of Ideology | Share of Other Ideology |
|---------------|---------------------------|---------------|-------------------|-------------------------|
| Orbán I. | Fidesz-MDF-FkGP (Right) | 46.37% | 46.37% | 40.93% |
| Medgyessy | MSZP-SZDSZ (Left-Liberal) | 51.30% | 51.30% | 48.70% |
| Gyurcsány I. | MSZP-SZDSZ (Left-Liberal) | 51.30% | 51.30% | 48.70% |
| Gyurcsány II. | MSZP(-SZDSZ) (Left) | 54.41% | 54.41% | 45.34% |
| Orbán II. | Fidesz-KDNP (Right) | 68.13%* | 80.31%* | 19.43% |
| Orbán III. | Fidesz-KDNP (Right) | 66.83%* | 78.39%* | 21.61% |

4.2.4.b. Ideological Leverage

Furthermore, table 2 lists key circumstantial factors (e.g., ideological leverage) that have been quite different across the terms of past governments; the share of opponent ideology in parliament (the sole chamber) may provide an explanation for, for example, why the Medgyessy-Gyurcsány I. duo—owning only a bit more than half of the parliament—failed to deliver the changes (e.g., reconciliation) they aspired to. The figure below shows it more visually how these power relations in parliament changed over time. More concretely, it indicates that social democratic governments in the past faced twice the extent of ideological opposition than the recently ascended populist right, which fits well into Gyarmati’s (2008, 392) report when she writes that the Medgyessy government did not have “enough courage” to follow through with its family policy reform agenda.

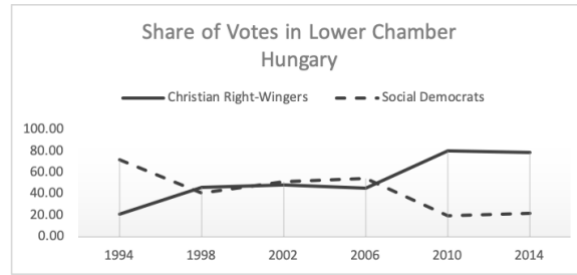


Figure 7 Ideological Leverage over Two Decades in Hungary

Female Participation in Policymaking

The left-right divide also matches the patterns of female participation in government, which has neither reached the EU average (i.e., 28.4 %, OECD 2021) nor the world average (i.e. around 24%, Council on Foreign Relations 2021). One can easily detect a leftist tone in including women in ministerial positions, which is especially striking when compared to the proportion of female MPs and majority members in general. Although there is set relation between familisation, party ideology and female leadership, I dare say that it still appears that party ideologies, with a pre-existing stance on gender roles, determine how many women have access to powerful positions within the party as well as government. The delicate causal relationship between party ideology, policy and women's share in decision-making remains a question for future theses.

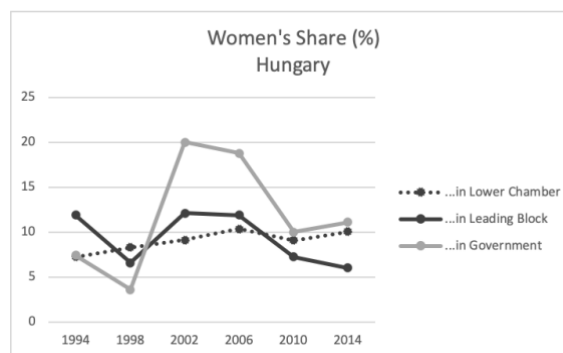


Figure 8 Women in Decision-making Positions. Data from: *valasztas.hu*

4.2.4.c. *Europeanisation Prospects*

Europeanisation has been a significant force in highlighting the importance of female labour market participation and formal childcare provision, especially given the conditionality mechanism that amongst others required progress towards the 2002 Barcelona Objectives—that at least 90% of children between 3 and 6 years of age should be enrolled in kindergartens and one third of the children under the age of 3 in nurseries and creches (European Commission 2019a). It is a must to stress that before those objectives, the soft requirements of the European Union were two-fold: one being budget rationalisation and stabilisation (also promoted by the Bretton Woods institutions) and the inter-policy principle of gender equality. However, this very idea only fit the social democratic policy agenda, therefore it was mostly the Medgyessy, and the two Gyurcsány governments that emphasised reconciliation policy not only as a social good but also a European value; by contrast, the right-wing conservatives and populists—who disfavoured using family policy merely as poverty relief but were reluctant to stand up for reconciliation—tended to highlight the internationally outstanding Hungarian welfare state generosity of which the country can be proud and which it must continue to foster. It must be stressed that it was the right-wing Fidesz-led coalition government in 1998 to commence the pre-accession talks with the EU, appealing to its regime changing image; however, the already existing contradictions between the party's policy opinion and that propagated by pro-equality EU institutions soon grew into fervent scepticism.

4.3. Familisation Landscape over Time: Poland

4.3.1. By Expenditure

Using the OECD definition of family support spending, it can be observed that even though Poland has been a residual supporter of families, in-kind spending has been slowly but gradually increasing over the years while, by contrast, cash benefit expenditure went through a major fall in

the first years of transition and stagnated around 1% up until 2015. In this year, however, once PiS managed to form a majority government in the Sejm, family policy was profoundly reformed. Figures 9 and 10 below show this more visually: while spending on cash transfers experienced a downfall in the first years of transition, in spite of some obvious increase under the Buzek administration (1997-2001), it modestly slid downward until 2007-2008, where it stagnated for another 4-5 years under the Tusk governments (2007-2011 and 2011-2015). Regarding social services, one can clearly comprehend why Poland has been for years characterised as a residual, ungenerous welfare state, and, on top of that, implicitly familising (e.g., Szelewa and Polakowski 2008; Leitner 2003), since social service spending is barely significant in the first two decades of the transition, as compared to the 0.7-0.8% OECD average (OECD 2019, PF 3.1), and only reached 0.6% by 2016.

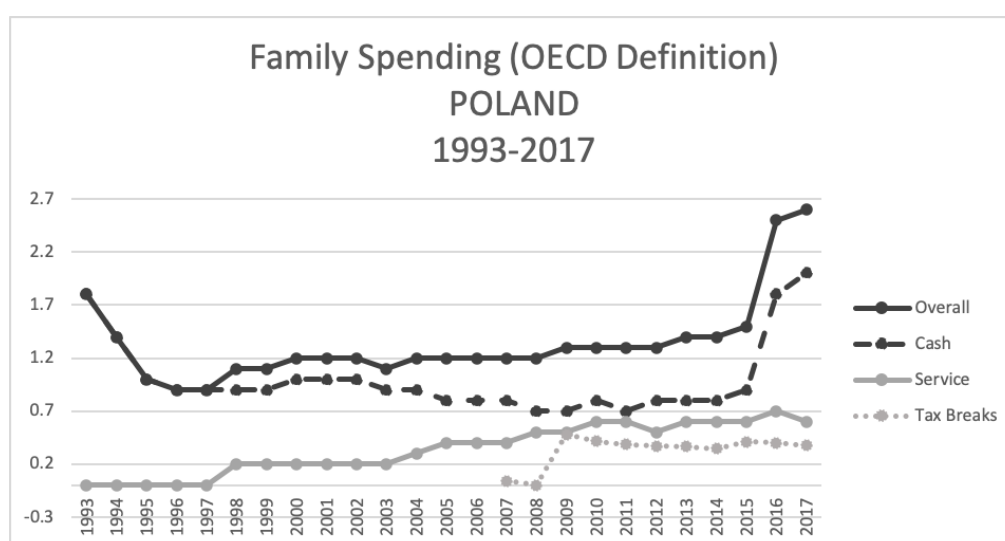


Figure 9 OECD Social Expenditure Database. Data: % of GDP in HUF

When one looks at the annual changes to the expenditure, figures (...) and (...) visualise quite well the loci of budget reforms in the past years. Firstly, the most obvious of these is in 2016, the year of robust budget expansions regarding the Polish cash benefit system, possibly forever breaking with Poland's previous image as a frugal welfare state. This was although accompanied by a 10% increase to the social service (e.g., childcare) budget, the budget was downsized the following year to the same extent. For that reason, these changes, strictly based on the expenditure, account for

explicit familisation. Secondly, during Miller's (2001-2005) leftist, labour party government, the social services budget was almost doubled by the end of his administrative term, with cash spending on the backseat, showing an ideal-typical defamilising budget reform. Thirdly, as opposed to what one may expect from a Christian conservative coalition government, the Tusk's first OP-PiS cabinet pushed through a less obvious but strictly speaking still defamilising budget reform, increasing social services expenditure by almost 50%.

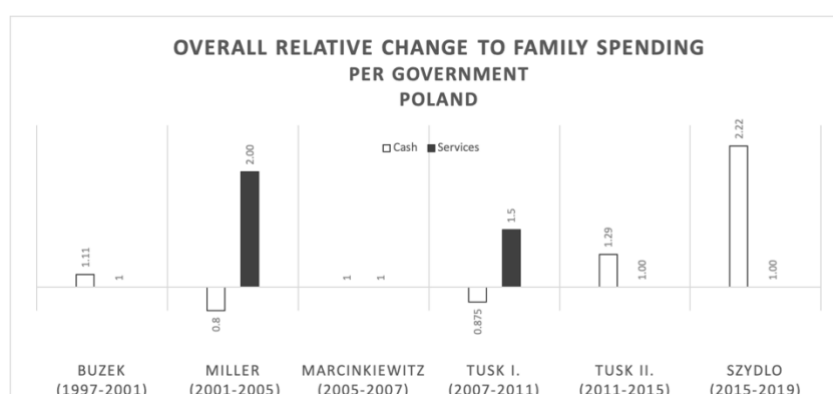


Figure 10 OECD Family Indicators, PF1.1. Data: % of GDP.

4.3.2. By Policy

Buzek's Christian-conservative coalition (AWS-UW) government (1997-2001) entered a political landscape torn between the ex-communist left and the anti-communist right on the one hand and crippled by the parties' internal ideological disparities on the other. At the same time, the EU pre-accession talks had already been ongoing, which compelled a preceding trend of budget rationalisation, ergo budget cuts, especially on the part of the previous government led by an odd coalition of the leftist SLD and the conservative PSL (Basten and Frejka 2015, 54). Amidst all this, the 1997 election winner AWS (*Akcja Wyborcza Solidarnosc*), an umbrella organisation for right-wingers at the time, would soon crumble amidst the turbulent conflict between its free-market reformists and their Christian-conservative members (Tomaszewska-Mortimer 2010, 12), shrinking into a minority government to lead the country until 2001. Thus, although the AWS-UW had some reform ideas as to the family support system, primarily advocating for the extension

of mandatory parental leaves, the introduction of the family tax credit, and financial and daycare assistance to poorer mothers (Inglot, Szikra, and Rať 2012, 30), it only achieved incremental changes, such as the extension of the paid maternity leave firstly from 16 to 20 weeks and eventually to 26 weeks and the introduction of daycare assistance to the poor (OECD 2019b, PF2.1). Given the government aspirations to incentivise to and help mothers care for their infants, while keeping childcare spending at barely 0.3%, the Buzek government is explicitly familising.

Upon the momentary disintegration of the Polish political right, the leftists—SLD and UP—arose to the top of the polls and formed a coalition government (2001-2005) that would seek to bring Polish family policy into a different light. As opposed to previous years where only one out of the two parents, and only the parent, could apply for unpaid but job-protected rearing leave, from 2002—based on the art. 189 §1 of the Labour Code at the time—not only could parents share that three months among themselves, but also nominated guardians could apply. Moreover, working parents had also the chance to require their employers to reduce their working hours for the duration of the rearing leave without officially taking it (OHCHR, 152-153). At once, the official paid maternity leave period went through a striking change, being reduced from 26 to 16 weeks, while other leave types were untouched (OECD 2019b, PF2.1). Women's rights, poverty relief and childcare came to the fore as policy priorities. Amidst heavy budget and lobby pressures that halted policy reform, the coalition government managed to consolidate the cash benefit system although still designed for poverty relief and cash-based assistance but more extensive than the previous social insurance approach (Inglot, Szikra, and Rať 2012, 29). In the end, the coalition finished its term in government with a bitter end, as family allowance were reduced, eligibility further restricted, while state infrastructure struggled to keep up with the need for formal care and other help from the state (2012, 30). Altogether, be the SLD-UP however negatively perceived, their policy agenda and its execution (notwithstanding the dominantly right-wing political space and employer lobbying) both fit the ideal-typical definition of defamilisation.

In the 2005 parliamentary elections, the Christian right-wing PiS and the centre-right PO acquired the absolute majority of the seats, but upon the failed coalition talks, the frontrunner PiS formed a minority government firstly headed by Kazimierz Marcinkiewicz and after his resignation following a disagreement with the party leader, by PiS head Jarosław Kaczyński himself. Given the lack of consistency across Poland's right-wing at the time, the populist-conservative League for Polish Families (*Liga Polskich Rodzin*), a party of 34 seats in the Sejm and 7 in the Senate, but with strong ties to the Polish Catholic Church, managed in winter 2005 to put forward an eventually approved proposal of a universal cash benefit to mothers (*becikowe*), contrary to general PiS aspirations (Inglot, Szikra, and Raŧ 2012, 30). In a two years' time, another proposal was presented by the party in front of the Sejm concerning a generous reform to the family tax benefit (2012, 30). Other conservative reform ideas, as per the reportage of Inglot, Szikra, and Raŧ (2012), also emerged in these years, ones that were not confined to the cabinet circles but burst out into broad-based petitions and advocacy campaigns. Childcare was seldom on the table but was regarded favourably by centrists.

Under the two Tusk (PO leader) governments, possessing a sweeping majority in coalition with PiS, shifts in the domain of family policy were considerable and ideologically inconsistent. Firstly, the first cabinet (2007-2011) gradually re-extended the mandatory maternity leave from 16 to 18 and eventually from 18 to 22; however, at the same time, in addition to that three months of unpaid childrearing leave fathers and mothers could share, the first official paternity leave (*urlop ojcomski*) of one week was introduced with 100% wage replacement. This would further evolve under the second Tusk government (2011-2015) where maternity leave was increased to 26 weeks (4 of which optional) at 60% replacement rate, and a new paid and where optional parental leave (of 26 weeks) were introduced alongside a paternity leave extension by another fully paid week (OECD 2019b, PF2.1). As opposed to the past system unfavourable to private childcare provision, the reform of

2011 made childcare outspokenly a major labour and family policy issue and sought to facilitate the proliferation of (mostly private) childcare facilities across the country. This legislation was arguably the product of the increasing demand for formal care facilities and the budget constraints alongside inter-cabinet dissent that made substantial childcare expansion a fiscal impossibility. Incentivising the private sector remained the only option (Czarzasty 2013). Overall, both Tusk governments suffered from internal conflicts between its moderate-liberal and Christian-conservative members, and thus it failed to accommodate at particular viewpoint as to the desirable family policy reforms. Work-family reconciliation was certainly a recognised issue in light of which were made the leave policy reform and the childcare subsidy legislation; at the same time, however, most of these policies rested on familialist tenets of home care. Since both terms of government had relatively new and characteristic defamilising features (e.g., allowing shareable leaves, private childcare reform) and yet a strongly familising nature (e.g., no state-provided and free childcare), both of them qualify as optional familisation.

Szydło-Morawiecki I. (2015-2019) immediately after assuming office broke with the previously poverty oriented, means-tested family support in favour of one that would boost reproductive attitudes and child health (Sowa 2016). Long before its chance to form a single-party cabinet, PiS has been vehemently against the residual family policy in Poland and warned against “the civilisational downfall” (107) based on the country’s reproduction patterns (Partii Prawo I Sprawiedliwość 2015). The child-raising benefit introduced by the Family 500+ (*Rodzina 500+*) was now universal to families with two or more children while income-tested to those with only one. Simultaneously, economically inactive young parents became eligible for additional income support in 2016, and generally, previous benefit sizes almost doubled by 2017 (ibid). At once, the government carried on with the pre-existing trend of extending maternal and parental leaves, although the way they did it was reducing by 4 weeks (from 24 to 20) the paid maternity leave and extending the paid parental leave by 6 (from 26 to 32) and extending the available unpaid

childrearing leave period by six weeks (Kurowska, Michoń, and Godlewska-Bujok 2020; OECD 2019b, PF2.1). This was made with the mindset to transfer the optional 4 weeks of the maternity leave to the paid parental leave that is also optional. Upon the 2015 revision of the Labour Code, 6 weeks of the paid parental leave also were allowed to be shared amongst mothers and fathers (Topinska 2015). Childcare, as expected, remained again in the background, which highlights the explicitly familising nature of the Szydło-Morawiecki government; nevertheless, given the efforts to even out the caring burden on adults in the family via the benefit and leave systems, I categorise it as an example of optional familisation. The reforms to the leave system designed to even out the burden on adults in the household demonstrate the occasionally optional-familising nature of the Szydło-Morawiecki government; nevertheless, given the pale childcare discourse and action, in light of the immense cash transfer programme introduced, it qualifies as an example of explicit familisation.

4.3.3. By Condition

Childcare coverage, although being fairly inaccessible in Poland due to non-availability or eligibility restrictions, has been slowly rising in the past years. Based on Eurostat's metric specifically monitoring the Barcelona Objectives of 2002, the table below shows this trend divided into age groups.

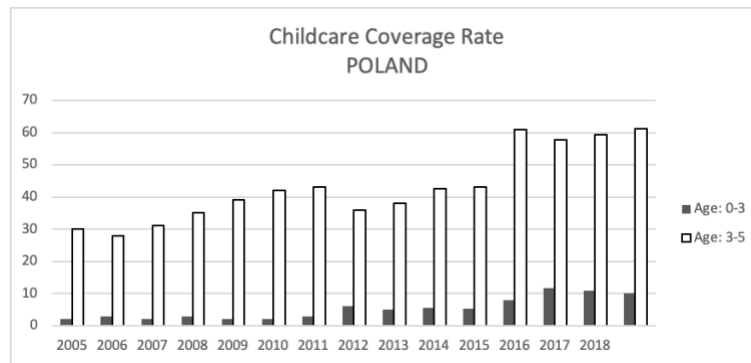


Figure 12 Eurostat, Income and Living Conditions. Variable: Formal Childcare by Group (ilc_caindformal)

Up until 2011, the year of Tusk's II. childcare bill meant to be stimulating for the private sector, coverage rates under the age of 3 lingered around 2-3 percent, while after 2011 it moderately increased to 10% in 2017. As to the 3-5 age group, they had a guaranteed place in childcare facilities which, however, was never consolidated into a comprehensive process (European Commission 2019b). Although the number of private care providers (including facilities as well as officially qualified nannies) grew, and since they have been relying on state subsidy, their growth and the children they enrol are included in the data. From the figure above, one can see that childcare provision before the age of 3 and above are two different worlds; while pre-age childcare is generally restricted to help out the poorest and the young, nurseries and kindergartens for those over 3 have been growing to be a universal service. Primarily, under the first Tusk government can we detect an increase in coverage of 8 percent; secondly, there is a jump of 16% in the coverage from 2015 to 2016. It is unclear whether that second jump could be attributed to any policy enacted

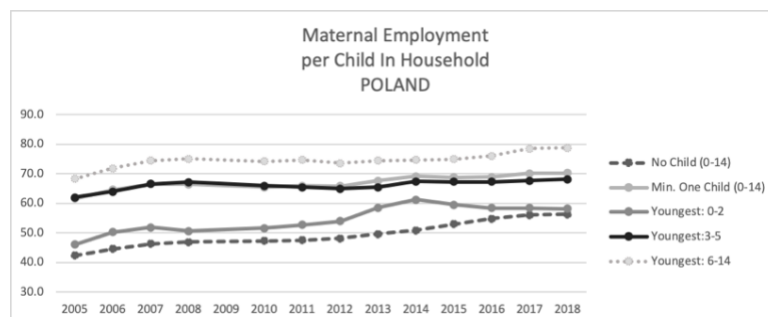


Figure 11 OECD Social Indicators, Family. Variable: LMF 1.2.C Maternal Employment by Age of Youngest Child.

by the PiS government given their lack of consideration of formal childcare; it might still be the result of the Tusk reform in 2011.

Regarding maternal employment, Poland has had relatively—to the CEE region and to the general employment levels—high maternal employment, although the causality between employment and having a child is a two-way road. As the figure below shows, maternal employment rates are generally higher in Poland than the same rates for those who do not have a child under 14 years of age. This could be misinterpreted in multiple ways; however, in light of the Polish policy reality, it is more likely that most people dare not take the responsibility of raising a child without sufficient backing, ergo a paid job. Childcare, including stay and nutrition, are available at a fee, and the family support system does provide only about 60 percent of income replacement for longer leave periods. Similar to the labour market situation in Hungary, part-time employment amongst one-couple households is extremely unlikely. According to the OECD Family Indicators, only around 6-7% of them have a setup in which one parent works full-time while the other part-time, and about 50% of them fit a dual-earner model (OECD 2019, LMF1.2).

4.3.4. General Conclusion

4.3.4.a. Ideology and Partisanship

The Polish political landscape, especially regarding social policy, has been ravaged by ideological disagreements, even within the right, and this together with a proportional voting system often produced incomplete, often jeopardised, family policies. What is visible, however, from the case of the recently ascended PiS is that once the institutional constraints are minimised, in part by acquiring absolute majority in parliament, just as in the majoritarian Hungarian case, seismic shifts can be made to the family policy system where ideology in leadership wishes it so. This is what Poland saw in 2015 where the cabinet enacted arguably the biggest social budget expansion of the

country's democratic history; although impressive, it bluntly disregarded more acutely needed assistance, such as childcare.

Table 5 Familisation Typology by Political Party

| Cabinet | Expenditure | Policy | Childcare rate |
|----------------------|-----------------------|-----------------------|-----------------|
| Buzek | Implicit Familisation | Explicit Familisation | - |
| Miller | Defamilisation | Defamilisation | - |
| Marcinkiewicz | Implicit Familisation | Implicit Familisation | No change |
| Tusk I. | Defamilisation | Optional Familisation | No change |
| Tusk II. | Implicit Familisation | Optional Familisation | Slight Increase |
| Szydło-Morawiecki I. | Explicit Familisation | Explicit Familisation | Slight Increase |

4.3.4.b. Ideological Leverage

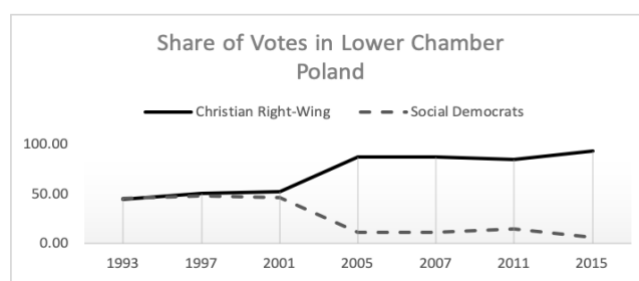


Figure 13 Elections Results by Affiliation. Data: wbyory.gov.pl.

The table above shows how the familisation landscape changed over the years in Poland. Although there are not enough social-democratic governments to determine with certainty that leftists tend to be more defamilising, it is certainly the case that most of the successful pro-childcare initiatives were proposed by pro-EU leftist leaders, and when under right-wing rule, they did not come from the PiS-OP agenda itself but from interest groups and woman members in parliament (Ingłot, Szikra, and Rań 2012).

Table 6 Government Characteristics and Share in Parliament

| Cabinet | Party/Coalition | Share Sejm / Senate | | Share of Ideology (Sejm) |
|----------------------|-----------------------|---------------------|-----|--------------------------|
| Buzek | UW-AWS (Centre-Right) | 56.7% | 59% | 56.7% |
| Miller | SLD-UP (Left) | 46.9% | 75% | 53.1% |
| Marcinkiewicz | PiS (Right) | 33.7% | 49% | 87.6% |
| Tusk I. | OP-PiS (Centre-Right) | 81.5% | 99% | 88.26% |
| Tusk II. | OP-PiS (Centre-Right) | 79.3% | 94% | 85.22% |
| Szydło-Morawiecki I. | PiS (Right) | 51.09% | 61% | 93.70% |

In spite of the effort of the country's leftists to reform the family system, it was only after 2007 that significant changes were made. Even though the internal ideological dissent between the OP and the populist-conservative PiS endured, with between 88 and 94 percent of parliamentary seats owned by right-wingers, they faced considerably fewer obstacles in policymaking than the SLD-UP coalition.

4.3.4.c. Female Participation in Policy

By contrast to Poland's reluctant policy system to expand childcare alongside a for-years right-wing dominated political environment, the share of women in political decision-making, although far from even, has been increasing steadily. Especially the first Tusk government brought about a change to female politics by selecting for almost every third ministerial position a woman. At the same time, the Polish Catholic Church—intricately tied with PiS, PSL, and onetime the League for Polish Families—has been halting efforts to recognise gender equality as an official national concern, whose lobby arguably in part produced the political impasses in the course of Poland's family policy trajectory (Warat 2014).

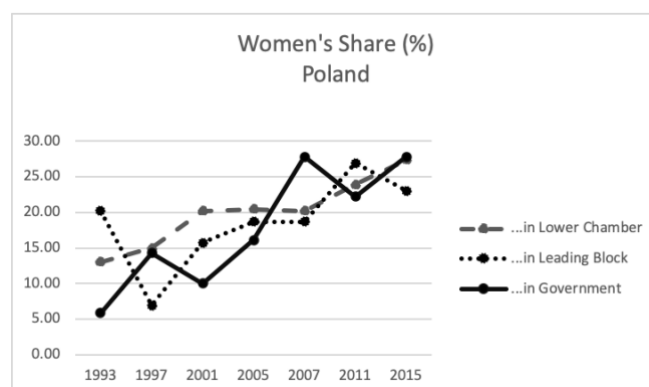


Figure 14 Percentage of seats occupied by women in the Sejm.
Source: wybory.gov.pl.

4.3.4.d. Europeanisation

Especially in Poland, where, as compared to Hungary, the political landscape was much more susceptible to coalition failures and deadlocks, given the proportional voting system and the internal conflicts in the political right, Europeanisation was bent in line with ideological

predispositions. Early conservative governments, like that of Buzek (1997-2001), followed through with a residual welfare design under the pretext of fiscal discipline for future EU accession while retained a relatively strong familialist flavour. It was only after the Barcelona Objectives and the electoral failure of the Polish right that the country saw a momentary but considerable paradigm shift in family policymaking, as the leftist coalition government brought gender equality and reconciliation into spotlight. The pro-European sentiment was carried forward by the Tusk governments, but less moderate right-wingers, tied to the Catholic Church, jeopardised most defamilising reforms—nevertheless, this period was distinctive in the amount of family policy amendments, especially in the domain of parental leave.

Chapter 5. Discussion on Hungarian and Polish Social Populism

5.1. How to Understand the Similarities?

The previous analysis mapped out how and—to the extent possible—why governments over the years in Hungary and Poland enacted family policy reforms, looking into on the one hand the question of ideology within leadership and institutional constraints and other exogenous factors on the other. This was necessary to put decision-makers in context, to fully understand the dynamics of family policy change, and thus to better comprehend the major family policy reforms that have been so characteristic of the two countries' conservative populists. This section is to provide an instance of their ideological and policymaking convergence, overall claiming the following:

even though there is convergence between the two in terms of gender role preconceptions, the perceived reason for a family policy in society, and their taste for cash incentives, they both have made steps towards optional familisation by adopting some measures to help work-life reconciliation.

The Fidesz-KDNP started off its second term in government by redoing the family policy that had been established by its social-democratic predecessors. In doing so it developed a pro-natalist, traditionalist agenda where motherhood, in context meaning jobless childrearing, needed to be promoted as a social virtue (Blaskó and Gábos n.d.; Rať and Szikra 2018). Similarly, to PiS that feared populational decline, Hungarian right-wingers became increasingly hostile to the idea of mothers leaving their children for work, and eventually both countries would grow into Yatsyk's (2020) definition of biopolitical populism. This policy plan entailed a cash and tax treatment heavy system of rewards for parents of Hungarian children; as Gyarmati (2008) recalls, the Fidesz-KDNP in 2010 went so far as to propose—in vain—to change even the voting system in a manner that would apply different weights to the people's votes based on the number of children they had.

Another particularity of this seeming convergence is that PiS had used to be a moderate policymaker on social issues; back in 2005, it was the populist League for Polish Families that drove most reform processes, not Kaczynski's cabinet who rather wanted to increase social spending on families only gradually.

All in all, the ideological disparities in the two countries fit well into the standard right-left efficiency-redistribution conceptualisation of welfare (e.g., Pestieau and Lefebvre 2018) until both populist conservative parties gained a sweeping majority. As opposed to the years where pre-2010 PiS and Fidesz were advocating for a relatively neoliberal budget plan, their rhetoric and since in government also practice went through a considerable change. Keeping up with the anti-genderist ideas characteristic of far-right parties (see as far-right mainstreaming in Bozóki 2016), they at once advocate for an expensive and loud family support system that is said to promote moralised views of social relations, claiming themselves to be the guardians of true “centrist” Christian values (Kerpel 2017). Although it may seem to echo the analysis of Otjes (2014) that claims contemporary populist to be promoting economic policies mixed with right-wing and left-wing objectives, since none of these countries' leftists promoted such a familising cash benefit system, this hunch may not hold. As provided above, post-transition leftists generally followed the EU's social democratic agenda that focuses on female labour activation and childcare; the Fidesz-KDNP and PiS policies seem nowhere near viewpoint.

5.2. How to Understand Particularities?

As opposed to the theorisations of radical right-wing populists as following the same anti-genderist, exclusionary political thought, these two populist regimes are of a different breed in terms of their reactions to political demand—which is arguably due to the fact that they are in leadership position and must act up in a way to maximise re-election. This is to say that not everything these regimes do are familising by nature, nor are they entirely similar. Firstly, as

mentioned above, the third Orban regime made several steps towards rendering work-life balance more bearable for mothers; in that allowing mothers to work during maternity leave while still on benefits was a major policy change. The same is true to the childcare reform in 2016 that consolidated the childcare typology framework (introducing mini nurseries) and the official requirements for private care providers to receive state subsidy (see above). As compared to the previous years, childcare coverage during this period rose considerably from 8 to 17%, even though not yet reaching 33% required by the Barcelona Objectives 2002. Secondly, PiS entered office with pre-existing experience on family policy from the time in coalition with PO for 8 years. Although the *Rodzina 500+* programme has had the obvious function to entice women back home to make more children, Szydło-Morawiecki regime made several amendments to the leave regulations, making 6 weeks of the optional parental leave shareable between couples, or even by officially designated guardians.

Table 7 Comparative Table between Orban II-III and Szydło-Morawiecki Cabinets

| Orban I-II | Szydlo-Morawiecki I. | |
|--|--------------------------------------|--|
| 2010-2018 | 2015-2019 | |
| Family Policy Summary | | |
| Overall Defamilising | Inherited Policy | Overall Optional-Familising |
| Implicit Familisation | Expenditure | Explicit Familisation |
| Explicit to Optional Familisation | Policy | Explicit Familisation |
| Significant increase | Childcare | Moderate increase |
| Reproduction with Moderate Reconciliation | Policy Objective | Reproduction with Moderate Reconciliation |
| Cash Incentives and Tax Credit | Focus | Cash Incentives and Tax Credit |
| Introduction of mini nurseries | Early Childcare | Childcare subsidy to providers |
| Characteristics | | |
| Right-wing | Overall leaning | Right-wing |
| Christian-conservative | Self-reported affiliation | Christian-conservative |
| Populist right-wing | Attributed affiliation ^a | Populist right-wing |
| Formal | Gender Equality Efforts ^b | Indifferent |
| Political Environment | | |
| Supermajority (2/3) | Seats | Absolute Majority (1/2) |
| Fidesz-KDNP Coalition Cabinet | Cabinet | PiS Single-Party Cabinet |
| Right-wing dominated | Climate | Right-wing dominated |
| Insignificant | Women in Leadership | Significant: highest in history |
| Direct link to KDNP coalition member | Catholic Church | Indirectly linked to PiS |
| Country Profile | | |
| Explicit Familisation | Familialism (Leitner 2003) | Implicit Familisation |
| 1998 | EU Accession Talks | 1993 |
| 2004 | EU Accession | 2004 |
| Age 0-3: Underdeveloped | Childcare Features | Age 0-3: Underdeveloped |
| Age 3-6: High | | Age 3-6: Moderate |
| (1) Father-mother difference is considerable | Maternal Employment | (1) Father-mother difference is considerable |
| (2) Few mothers (below 15%) with children below 3 work | | (2) Fewer mothers with children below 3 work but still above 50% |
| Scarce | Part-time Opportunities | Scarce |

5.3. Conclusions and Suggestions for Further Research

This Thesis, in part upon the recent policy reforms in Hungary and Poland, in part the recent populist upsurge across Europe, and in part in answer to the conceptual inconsistencies of (de-)familisation in scholarship, presents (1) two country profiles on the politics of family policy by applying de-familisation to parties rather than regimes, and (2) a cross-case comparison between latest populist policymakers that have followed oddly similar agendas irrespective of their countries' divergent policy histories. In essence, it finds that the ideological battles in the earlier years of transition fit well into the standard model of right-vs-left welfare politics; however, this

changed when the parties that scholarship now calls populists (e.g., Fenger 2007; Fischer 2020; Orenstein and Bugarič 2020) entered into power with oddly similar, but as compared to their respective countries, quite distinctive agendas. This partly supports the theses put forward by Orenstein and Bugarič that in contemporary Hungary and Poland what is happening is the emergence of a traditionalist “fatherland” (2020). Although I must make my reservations based on the data that there have been some significant—yet admittedly insufficient—steps towards work-life reconciliation.

I also found that the road between what is promised and what is done by leaders, specifically in the overly moralised domain of family policy, the nature of voting system and the share of opposing ideologies in parliament have a decisive role, while I found strong cues that the time of the major family welfare reforms in Poland coincided with women’s gaining more positions in political institutions and lobby groups. By contrast, in Hungary, despite the higher childcare coverage rates, childcare reforms were fairly incremental while the number of women in parliament and in leadership have been consistently under the EU and OECD average, generally around 11% (see above). This remains one difference that ought to be further investigated: specifically, that what lobby groups, groups of politicians, and informal dealings predetermine the face of family policy?

5.4. Limitations

The Thesis was meant to offer a qualitative case study with the support of the relevant quantitative data yet given the author’s resources and necessity to limit his scope, several other ways could have been chosen and several other aspects of the topic could have been further investigated. Specifically, regarding the exogenous factors such as Europeanisation and lobbying, further research could apply more extensive analysis as to the informal dealings, market pressures, and external forces on domestic policymaking.

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