

# **CONTINUITY AND CHANGE IN FAMILY POLICIES OF THE NEW EUROPEAN DEMOCRACIES:**

## **A COMPARISON OF POLAND, HUNGARY AND ROMANIA**

**PART II: PATH DEPENDENCE AND PATH DEPARTURE IN FAMILY POLICIES  
SINCE 2000**

*An NCEEER Working Paper by*

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## **Executive Summary**

Our disaggregated analysis of family policy developments since 2000 (Part Two of this study) reveals new opportunities for path departure in all three countries, with political actors (and policy entrepreneurs) (Cook 2007) and ideational shifts (Schmidt 2009) playing a major role. Individual and group policy entrepreneurs in Poland, organizations of large families in Poland and Hungary, and local government activists and middle class women in Romania skillfully exploited domestic political channels and newly available international assistance from the European Union to influence policy change in family allowances, childcare, and social assistance. Still, Poland represents the only example of an attempted “paradigmatic” shift in family policy across the board, dealing with several major program areas at once. Even there, however, the proposed changes fall short of a dramatic overhaul of the core programs such as the major cash transfers for the families and children. In all instances, the most powerful players faced formidable obstacles in the form of institutional legacies of preexisting programs. The most successful reforms such as the introduction of new benefits (tax credits) in all three countries or recent expansion of kindergarten services (early education) in Poland and Romania have taken place on the margins of national family policy. We suggest that only when family policies become significantly less reliant on the historically most entrenched pillars of social insurance, and in case of Romania and Hungary also equally well-consolidated employment-related budgetary cash transfers such as family allowance and childcare leaves, and focus more on non-traditional policy goals, now supported by the new middle classes, such as the well-being of children and care opportunities for working mothers, we might witness significant cumulative path departure. Finally, since 2000 we observe an accelerated merger of conservative, pronatalist ideologies with a neoliberal emphasis on individual rights reserved primarily for working

families, emerging urban middle classes, and individual workingwomen across all three countries but with varied intensity and effect. Poland serves as the best illustration of this trend; followed by Romania. Hungary under the second Orbán cabinet exemplifies the lasting power of traditional state paternalism, reinforced by the failure of previous social democratic and neoliberal reforms. Finally, the continued salience of demography has bolstered the influence of many pre-existing institutions and patterns of family policy across the post communist region, with Hungary as the leading example, followed by Romania, and lastly by Poland where for the first time ever population concerns elevated this category of social policies, targeting the young rather than the elderly, to the very top of the national agenda.

In Part One of this paper we identified institutional legacies of family policy development in the three countries and demonstrated their impact. In general, considerable variation in past trajectories of the national programs focusing on families, mothers, and children continued through the 1990s [see **Table 3**]. Hungary remained faithful to comprehensive family protection as a main national goal and successfully resisted policy retrenchment despite gradual erosion in spending and levels of family allowances and childcare payments (GYES and GYED). Poland persisted in its restrictive approach to almost all programs but also initiated significant policy change in the pivotal and costly family allowances, causing dramatic decline in this category and also in nursery childcare. Still, despite good economic performance all other cash benefits and kindergarten attendance stagnated at a low level until the early 2000s. Romania, in turn, concentrated mainly on incremental adjusting of laws and standards to an average Central European level after decades of neglect under Ceaușescu regime. In contrast to Poland, we observe there measurable progress in modernization of social insurance laws already before 2000, especially in family allowance, maternity, and childcare benefits but accompanied by erosion in spending, payment levels, and service quality across the board. We must keep in mind, however, that this occurred amid continuing economic downturn of -12% GDP in 1997-99 alone, which further widened the gap between this country and Hungary or Poland. The latter two countries each displayed 4-5% average growth levels during the same period.<sup>1</sup>

Ten years later, in 2010, Hungary still remains in the lead in most areas, with noticeable improvement in family allowances, birth grants, and kindergarten attendance. This time, however, Poland and Romania made much more substantial progress, resulting in unexpected convergence across the three countries at least in the areas of maternity protection, tax

<sup>1</sup> See ERBD Transition Report, 2000 and for Romania, Economist Intelligence Unit, [www.tmc.net.com/submit/2007/06/04/2687527.htm](http://www.tmc.net.com/submit/2007/06/04/2687527.htm), accessed July 18, 2011.

deductions, and kindergarten services [**Table 3**]. Poland shows the most dramatic upgrades in four out of six areas: maternity leaves (22 weeks plus an additional paternity leave<sup>2</sup>), new generous birth grants (double for low-income families), new tax credits for children, and measurable increase in kindergarten attendance. Surprisingly, nursery services also rebounded slightly but family allowances continued the downward trend in both quality and spending. Romania progressed comparatively less than Poland overall but fared much better than during the previous decade. It reformed family allowances (now better targeted toward poor households but without abandoning universalism) and improved kindergarten attendance. In contrast, nursery care continued to decline and birth grants diminished in value.

We will attempt to explain these changes by examining the interaction between domestic and international influences. In doing so we will address **Hypothesis 2** which emphasizes the role of various political players and potential coalitions of actors behind family policy decisions and **Hypothesis 3** that concentrates on the ideational context that might impact the overall trends and/or reforms in this area of the welfare state. The latter also involves interaction between the relevant national ideologies and imported ideas from the rest of Europe. In the last decade two types of dramatic changes, one external and one domestic, impacted all three countries in ways that might have contributed to at least partial convergence, and in some instances also path-departure in family policy development. First, EU membership provided access to developmental funds that could be creatively channeled to support social programs at the national and local levels. Second, all three countries experienced dramatic shifts in national politics that resulted in the marginalization of the ex-communists, but even more important the decline of social

<sup>2</sup> With a long-term goal of 26 weeks for mothers and four weeks for fathers by 2014.

democratic or socialist tendencies of all political forces identified as the “left,”<sup>3</sup> and a corresponding rise of center-right or conservative parties with growing support from the emerging, urban middle classes.<sup>4</sup>

## **POLAND: Politics, Ideology, and Path-Departure in Family Policy After 2000**

### *Demographic Emergency and the Shift in the Polish Family Policy Agenda, 1999-2002*

The recent wave of reforms of Polish family policies originated during the late 1990s and early 2000s when the country suddenly began to face a serious demographic challenge. Although its fertility rates had been dropping steadily since 1989, in 1999 Poland registered the first ever, year-to-year population decline (Szyszka 2008, 57). This phenomenon spurred widespread discussion among experts, culminating in the Population Congress of 2001-02. Furthermore, escalating awareness of this problem among the general public and the social policy establishment (Balcerzak-Paradowska 2004: 225) coincided with a new wave of immigration<sup>5</sup> to Western countries following the EU accession in 2004 and thus exacerbated the feeling of a looming national crisis (Balcerzak-Paradowska, Golinowska, interviews 2009, 2010).

Since the mid-1990s the clash between the ex-communist left and the post-Solidarity parties paralyzed all progress in this area. First, in mid-1997, the newly reunited Solidarity groups (*Akcja Wyborcza Solidarność* - AWS) campaigned on an electoral program called

<sup>3</sup> In many countries of the region ex-communists successfully “reinvented” themselves ideologically as “socialists” or “social democrats” and politically as capable managers of governmental affairs. (Grzymała-Busse 2002).

<sup>4</sup> In Poland and Hungary these parties originated from the former opposition to the Marxist-Leninist regimes whereas in Romania they were founded by former communists who initially had been denied full access to power.

<sup>5</sup> During 2004-2009 about 2.3 million working age Poles left the country for better paying jobs in EU countries that opened their labor markets to the new member states (Emigracja Polaków 2010).

“Always Poland, Freedom, and the Family,” with a strong emphasis on large families and mothers with young children as the foundation of the nation.<sup>6</sup> The ruling coalition of ex-communists (Left Democratic Alliance - SLD) and the Peasant Party (PSL) (1993-1997) responded with an official “family policy program,” first of its kind in Poland and published on the eve of the 1997 parliamentary elections. It emphasized assistance for low-income families and thus drew heavily on the legacies of the 1970s, 1980s, and the 1995 program of the Ministry of Labor. This time the main difference lay in more explicit reliance on local communities and NGOs, rather than the central government, for benefit and service provision (Balcerzak-Paradowska 2004, 222; Szyszka 2008, 30) - ideas partly inspired by the neoliberal orientation of many SLD politicians, and the prospects of EU funding.<sup>7</sup> Two years later, after the electoral defeat of the ex-communists, the governing AWS coalition replaced this document with a much more comprehensive program that focused on the traditional family as the main national and Christian value. Published in November 1999, the “Program of Pro-Family Policy of the State”<sup>8</sup> for the first time listed fertility increase as a major goal but also emphasized self-help and subsidiarity, proposed child tax credits, and extended maternity leaves and special assistance for large families while supporting basic state assistance for the poor, including guaranteed minimum income. Coming late in the tenure of the AWS coalition, this document resulted in only one major policy change - a sharp increase in maternity leave, from 16 to 20 weeks, in 2000, and again to 26 weeks before the next election in 2001, won this time by the SLD. The new government of Leszek Miller immediately changed course, however, toward an emphasis on

<sup>6</sup> See the electoral brochure, *Akcja Wyborcza Solidarnosc: Program: Zawsze Polska, Wolnosc, Rodzina*. Warsaw: Krajowy Komitet Wyborczy Akcji Wyborczej Solidarnosc. May 1997.

<sup>7</sup> For example prime ministers Leszek Miller, Włodzimierz Cimoszewicz, Marek Belka, and president Aleksander Kwasniewski.

<sup>8</sup> *Polityka Prorodzinna Państwa*. Document published by the Chancellery of the Council of Ministers, Warsaw, 3 November 1999. [www.premier.gov.pl](http://www.premier.gov.pl), accessed 24 May 2011.



“jobs, social insurance, and pro-European social standards” rather than “family policy” per se (Szyszka 2008: 35). In practice this meant a quick reversal of the generous maternity law, which meanwhile also created massive resistance from employers and contributed to rising social insurance expenditures (Balcerzak-Paradowska 2004: 251-52; Szumlicz, interview 2010). Meanwhile, once again, attention of social policy reformers within the labor ministry turned to family allowances and related cash transfers as more conventional, but since the 1995 reform also much less costly, option. The timing of this move coincided with the crucial period of EU accession negotiations of 2000-04 that compelled the Polish government to find creative ways to reconcile domestic welfare agendas with broader European goals of gender equality, social inclusion, labor activation, and regional development.

#### *Determinants of Path-Dependence and Path-Departure in Polish Family Policy during 2003-2010*

Detailed analysis of family developments in Poland since 2000 reveals a complex process of interaction among four major sources of policy initiative. The first of these consisted of the “old school” experts and administrators working for the Ministry of Labor and Social Policy and the Institute of Social Policy in Warsaw. The second represented an amalgam of populist politicians from the extreme Catholic party – the League of Polish Families (LPR) and their allies from the farmer’s Self-Defense party (*Samoobrona*). The third, and ultimately the most influential group came together under the leadership of Joanna Kluzik-Rostkowska, a moderate politician and Deputy Minister of Labor from the conservative Law and Justice party (PiS). Finally, the last source of policy change can be traced to a few influential NGOs and their lobbying efforts, both at domestic and European levels.

The sudden prominence of demography and family policy as a national topic during 1997-99 generated new demands for accelerated reforms in this area. “Old school” experts working with the government responded with specific proposals, mostly aiming at the traditional cash benefits. Sponsored by the SLD politician and Plenipotentiary for Family and Women, Jolanta Banach, these efforts focused primarily on helping low-income families (Golinowska, Szumlicz, interviews 2010). This approach not only recalled the 1970s plans but also partly adhered to a social democratic platform with its strong emphasis on poverty reduction, single mothers, and more streamlined targeting (Esping-Andersen 1999: 161-62). It differed, however, from the contemporary European trends because of a deep distrust in subsidiarity,<sup>9</sup> and in particular in the capacity and professionalism of local governments and NGOs (Balcerzak-Paradowska, Szumlicz, interviews 2010). The final family benefits law of 2003<sup>10</sup> received widespread praises for successful integration of all basic cash payments (except maternity) under one simplified umbrella (Chłoń-Domińczak, Szumlicz, interviews 2010). Means-tested family allowances now functioned as a “gatekeeper” that opened the door to other benefits, including child-care allowance (also conditioned on the previous work record), a nursing supplement, a single mother supplement, etc. The larger goal of the reform was to create a middle category of programs, between traditional social insurance and public assistance, to serve an expanded group of families with income per person falling below c. 25% of an average wage in 2003, an amount to be adjusted upwards every few years (Balcerzak-Paradowska, interview 2009).

As a result, family benefits in cash became more transparent and easier to manage but the reform failed in its promise to provide better assistance to households in need. Spending for

<sup>9</sup> A stipulation that the EU should govern as close as possible to the citizen.

<sup>10</sup> Ustawa z dnia 28 listopada 2003 r. o świadczeniach rodzinnych Dz.U. 2003 nr 228 poz. 2255. <http://isap.sejm.gov.pl/DetailsServlet?id=WDU20032282255>, accessed 25 September 2011.

family allowances continued to drop every year, with the exception of 2006, when the government of Jarosław Kaczyński introduced a new payment structure based on the age of children. Nonetheless, the number of recipients declined steadily throughout the late 2000s (Ministry of Labor, Poland 2004-10). Because the means-testing threshold remained fixed, less than 50% of Polish families qualified to receive the benefit (Szumlicz, interview 2009).<sup>11</sup> Other unintended effects of the 2003 law included a sudden wave of claims to single mother's supplements, combined with a steep rise in separation and divorce filings that were now required to receive cash assistance for children previously available from the recently abolished Alimony Fund (Kocur 2008).<sup>12</sup> These problems and also the neglect of family policy at the cabinet level under the SLD government of Leszek Miller weakened the position of the labor ministry and further delegitimized its attempts to address the demographic crisis in an effective manner. Moreover, although the experts and ministry officials accepted the European social agenda, especially "the open method of coordination" (OMC)<sup>13</sup> in social policy and its requirements of regular reporting and monitoring of national actions, they lacked sufficient political support at home for their social democratic ideas that concentrated on low-income households and single working mothers. The Polish "left" politicians and their economic austerity policy of the early 2000s further undermined these efforts at the time when public opinion increasingly focused on both the population problem and the worsening economic condition of families. Only after the defeat of the SLD-PSL coalition in the election of 2005 a chance for a significant policy

<sup>11</sup> From 2004 until 2011 the number of children in families receiving the allowance dropped from 5.5 to 3 million. (Topolewska, 2011). In the meantime average gross wages grew by about 30 % (*Rocznik Statystyczny GUS*, 2005-10 and own calculations).

<sup>12</sup> The Fund was restored only in 2008 after protests and years of public debate.

<sup>13</sup> Open Method of Coordination (OMC) is a "soft" method of harmonizing policies of EU member states, utilized in areas where the EU does not want to interfere directly with the internal affairs of member states. Its tools include reports, conferences, exchange of best practices and training.

initiative materialized.<sup>14</sup>

The return of the Solidarity-based opposition to power, in the form of a minority government led by the Law and Justice party (PiS), brought about a sharp ideological turn to the right. It also produced a major realignment of the party system, dividing the former anticommunist camp into two main rival groups, Law and Justice party (*Prawo i Sprawiedliwość* – PiS) and the Civic Platform (*Platforma Obywatelska* - PO). While these major contenders for power concentrated on fighting each other, the demographic “emergency,” highly augmented by the media during the 2005 elections, presented a unique opportunity for a small radical Catholic party – the League of Polish Families (LPR), and in part also its rural ally – the Farmers Self-Defense Party (*Samoobrona*), to launch a short-lived but remarkably successful populist campaign focused on the traditional family. The LPR, whose support never surpassed single digits, wielded disproportionate influence during 2006-2007 as a junior coalition partner of the ruling PiS. Even as early as 2005 they outmaneuvered the minority cabinet and convinced a parliamentary majority to adopt new controversial birth grants for every newborn (*becikowe*<sup>15</sup>) against the wishes of Prime Minister Kaczyński who planned to restrict this program to the poorest families. A complex bargain between the LPR and the opposition, center-liberal Civic Platform (PO), increased the grants to 1,000 zloty,<sup>16</sup> and the low-income parents got double the amount (Olczyk&Majda 2005). Once again, in late 2007, on the eve of the next election, the LPR joined with another small Catholic group in a successful effort to introduce relatively generous

<sup>14</sup> The demise of the left meant also spelled the end of all hopes for an emergence of any social-democratic model of family policy, cultivated among a narrow circle of social policy experts in Warsaw who also grew progressively disappointed with the neo-liberal, economy-center approach of the mainstream SLD politicians (Golinowska 2010, interview) These efforts received support from the social-democratic German Fredrich Ebert Foundation (Golinowska & Zukowski 2009), but overall had limited impact on family policy reforms during the 2000s.

<sup>15</sup> The Polish nickname for the benefit, which translates as a “baby blanket fee.”

<sup>16</sup> About 40% of average gross wage in 2006, the first year of the grant.

tax credits for children, initially also proposed by Kaczyński and the finance minister at a much lower level (Krupska, interview 2009).<sup>17</sup>

The third, and the most important source of the family policy reform - the Family Policy Program of March 2007<sup>18</sup> appeared shortly before the formation the short-lived (May 2006-September 2007) coalition of the PiS, LPR, and Self-Defense, and preceded the electoral victory of the opposition PO in October 2007. As stated by one of its authors, it materialized mainly because of the unusual commitment and leadership of a moderate female PiS politician, Joanna Kluzik-Rostkowska, and demonstrated a belated reaction of a few determined policy entrepreneurs to the lack of strategic initiative by the Ministry of Labor and traditional welfare experts (Marczuk, interview 2010). The program differed fundamentally from all previous documents of this kind, for example the 1997 and 1999 family policy programs, because of its basic premise of a widest possible consensus. Kluzik-Rostkowska, initially slated for a controversial and eventually liquidated post of the Ombudsman for the Family and Women,<sup>19</sup> used her new position as the Deputy Minister of Labor to assemble a six-member team of government officials, social policy experts, and activists. It included a deputy minister of finance, an experienced younger social insurance planner from the labor ministry, a journalist with extensive welfare expertise, a member of a radical Catholic right, and a female student. Left wing or feminist groups were not invited. The group seemed quite uniform in their conviction that the Polish feminists did not represent the interests of Polish women but they also explicitly dismissed the extreme position of the Catholic populists who wanted to keep all mothers at

<sup>17</sup> PiS eventually broke the ties with these groups, following major corruption scandals in 2007 but a few years later party continued to move further to the right, absorbing large segments of the former constituencies of the LPR and Self-Defense.

<sup>18</sup> *Rząd w trosce o polskie rodziny. Projekt polityki rodzinnej rządu Jarosława Kaczyńskiego*. Warsaw: March 8, 2007. [www.rodzina.gov.pl](http://www.rodzina.gov.pl) accessed 10 March, 2010.

<sup>19</sup> Prime Minister Jerzy Marcinkiewicz eliminated it soon after the October 2005 elections. It was reinstated in 2008.

home.<sup>20</sup> Formal launching of the program on International Women's Day – March 8, and its embrace of European labor activation initiatives, testify to the group efforts to steer a centrist course with a wide appeal to Polish women. While it also directly addresses the alarmingly low female labor activation<sup>21</sup> and the problem of poverty, the document actually offers a unique blend of socio-economic liberalism and Catholic conservatism. Kluzik-Rostkowska explicitly defended her middle ground position, located somewhere “between the Northern European perspective with its focus on women's rights and the Southern European one with its preoccupation with the family.” Another team member, however, specifically pointed out tensions between secular experts and Catholic fundamentalists<sup>22</sup> within the group (Kluzik-Rostkowska, Barszcz, Marczuk, interviews 2010).

The program's final policy recommendations drew heavily on sociological analyses of life preferences among the emerging urban middle class.<sup>23</sup> The final package of five basic reforms included a substantial increase in maternity leaves, more favorable laws on social insurance contributions for mothers on unpaid childcare leaves, new tax credits for children, new flexible laws on nurseries and kindergartens to allow alternative and flexible forms of care, and government support for widespread publicity campaigns on behalf of parenthood. Intended for gradual implementation during 2008-2014 with substantial EU funding and NGO participation, the program survived the cabinet change to the new coalition of PO and PSL in late 2007. By the time of this writing (August/September 2011) the majority of the proposed reforms have been

<sup>20</sup> The authors conducted separate interviews with four key members of the group, Joanna Kluzik-Rostkowska, Mirosław Barszcz (finance ministry), Agnieszka Chłoń-Domińczak (labor ministry), and Bartosz Marczuk (journalist – *Gazeta Prawna*).

<sup>21</sup> One of the lowest in the EU at only 54%. <http://www.eurofound.europa.eu/eiro/2007/05/articles/pl0705029i.htm>

<sup>22</sup> One member of the group referred to these people as the “Taliban.” (Barszcz, interview 2010).

<sup>23</sup> Main expertise and scientific support of the plan came from outside the government – from the Sobieski Institute, a think tank with strong links to neoconservative groups in Europe and the US. See <http://www.sobieski.org.pl/>

adopted, most recently the groundbreaking early childcare law of March 2011.<sup>24</sup> It shifted control of nurseries from the Ministry of Health to the Ministry of Labor, allowed the creation of mini daycare centers, and adopted incentives for parents to hire legal private nannies and companies to offer childcare facilities to their employees. Meanwhile, “*becikowe*” (child birth grants) and the higher family tax breaks (Kluzik-Rostkowska, Barszcz 2010) survived despite vocal opposition from the authors of the program and the considerable burden on the budget, de facto creating a new type of a “layered” system of benefits that has been deeply embedded in Polish social policy development since 1945 (Inglot 2008). Nevertheless, in a larger historical perspective it is difficult to deny the unusual success of the program that arrived on the heels of a widely publicized demographic emergency but was made possible due to a mix of favorable political circumstances, in part external, related to the availability of EU funding, but mostly domestic. Moreover, with the exception of a few left-wing groups,<sup>25</sup> the program won universal acceptance across the societal spectrum, including sound endorsements from prominent ex-communists (SLD leaders) and even few long-term supporters of social-democratic policy models<sup>26</sup> (Golinowska, interview 2010). In addition, the fact that the Polish economy has weathered the recent global crisis due to “a high share of domestic consumption as opposed to exports, a favorable labor market structure, and timely assistance from the EU,” (Leven, 2011: 183) provided the necessary cushion for policy implementation.

The success of the 2007 Family Policy program also derives from its self-restraining,

<sup>24</sup> Ustawa z dnia 4 lutego 2011 r. o opiece nad dziećmi w wieku do lat 3 (Dz.U. Nr 45, poz. 235), <http://www.mpips.gov.pl/wsparcie-dla-rodzin-z-dziecmi/opieka-nad-dzieckiem-w-wieku-do-lat-trzech/prawo/>, accessed July 22, 2011.

<sup>25</sup> The major point of contention was the adherence to the traditional definition of the family, based on motherhood vs. the focus on the social rights of individuals – a view that reject the need of a family policy and favors a more general social policy approached based on gender and intergenerational equality. See Jankowska 2007.

<sup>26</sup> Most notably former president Aleksander Kwaśniewski who called Kluzik-Rostkowska the “only sensible and likable politician from PiS” (Golinowska, interview 2010).

realistic assumptions about the legislative process and budgetary issues. Following the initial prime minister's endorsement at the cabinet level, involvement of the experienced Ministry of Labor strategist and planner, Agnieszka Chłoń-Domińczak, was crucial to winning over the social policy administrators and keeping them committed for four years, during the most difficult time of political turmoil and governmental change.<sup>27</sup> In addition, the Deputy Finance Minister, Marek Barszcz helped to get the costs in line with the strict budgetary criteria, additionally constrained by Polish ambitions to join the Eurozone. Eventually all actors in this process, including the mainstream experts from the traditional social policy community and the labor ministry (Barszcz, Szumlicz, interviews 2009, 2010) agreed that Poland could not afford universal family allowances but could and should concentrate on the cheaper option of gradually expanding maternity rights. Moreover, although they recommended free, government-funded childcare as a goal, the authors of the program embraced the principle of subsidiarity, with more responsibilities delegated to municipalities and NGOs funded by a mix of local resources and competitive grants from the central government and the EU.

From the very beginning a wide spectrum of non-profits took part in the consultations and discussions on the family policy program. A few large NGOs, however, simultaneously pursued their own independent agendas nationally, locally and also at the European level. Association of Large Families 3+ (*Związek Dużych Rodzin 3+ -ZDR 3+*) has been arguably the most influential of them all. Much smaller than its Hungarian counterpart, since the early 2000s it rose to prominence in the Polish family debate due to its leadership's pedigree,<sup>28</sup> savvy media campaigns, relentless lobbying efforts, and tacit support from the Catholic hierarchy, but also

<sup>27</sup> She was one of the key officials responsible for the adoption and implementation of the Polish pension reform in 1998. Trained partially in the west she remained in the ministry until her resignation in the spring 2010.

<sup>28</sup> Top activists of the group include a wife of a former government minister, Polish ambassador to the European Commission in Brussels, and the former chairman of the Polish Physicians Association, to a name a few.



skillful avoidance of political controversy and ideological conflicts. Upon closer examination its agenda, focusing primarily on subsidiarity, i.e. minimal state intervention in family life overlaps with the 2007 governmental program. They also oppose “becikowe” but disagree strongly on the need for more institutional childcare, as specified by the EU Barcelona directives to increase nursery capacity to serve at least 33% of 0-3 year olds<sup>29</sup> – the idea now officially adopted by the Ministry of Labor and incorporated into recent legislation. The association officially embraces the idea of helping the poor but opposes “unconditional handouts,” especially preferences for single mothers favored by the mainstream social policy administrators and experts during the late 1990s and early 2000s.<sup>30</sup> Disillusioned with the central government, it has increasingly concentrated on local efforts and in the last few years sponsored several successful initiatives that led to the creation of “family friendly” enclaves with the support of several municipal self-governments, many of which now offer so-called large family discount cards for transportation, sports facilities, daycare, and sometimes also generous aid packages for large families in need.<sup>31</sup>

The ZDR 3+ has regularly sponsored family-oriented events and conferences, including large national and international gatherings of experts, politicians, and social activists.<sup>32</sup> Its chairwoman, Joanna Krupska, also has served on the committee on family policy at the joint Government-Episcopate Commission and the association works closely with the European

<sup>29</sup> Barcelona Directives adopted in March 2002, see [www.consilium.europa.eu/ueDocs/cms\\_Data/docs/pressData/.../71025.pdf](http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/.../71025.pdf) (accessed 10 July, 2011).

<sup>30</sup> Since the mid-2000s the Polish social policy experts began to publish new data that indicates that indeed the large families are much more exposed to poverty risk than single mother households (Balcerzak & Golinowska 2009; 62, Szyzka 2008: 139).

<sup>31</sup> The authors observed the results of these efforts firsthand in several municipalities. The campaign to introduce special preferences for large families in the form of a “big family card” takes place simultaneously on the European and local levels, by-passing the national governments (Krupska, Benedykcinski, Golema, Castro, interviews 2010-11).

<sup>32</sup> See for example a large international conference in the Polish Sejm on 9-10 March 201, on the reconciliation of work and family -- “Poland for the Family, The Family for Poland,” financed in part by the European Social Fund (attended by one of the authors).

Confederation of Large Families Organizations (ELFAC). In interviews with the authors, however, she repeatedly stressed the secular character of the movement, which also apparently reflects the official position of the ELFAC at the European level (Krupska, Castro, interviews 2010 and 2011). Yet, other activists appear much more inclined to support a more traditional, restrictive model of the family. For example, single mothers can only join as “associate,” not full members. Also, overlapping membership of some leaders of the group in the pro-life movement<sup>33</sup> and Church-sponsored activities opposed to liberalization of abortion raises the question of the degree to which they wish or can act independently from the official position of the Catholic hierarchy. In contrast, Kluzik-Rostkowska, a practicing Roman Catholic and a long-time member of the conservative Law and Justice party,<sup>34</sup> never hesitated to defend her secular, centrist vision of social policy that included an unambiguous pro-choice position on such controversial issues as in-vitro fertilization or child adoption by unmarried couples (Kluzik-Rostkowska, interview 2010).

The Catholic Church in Poland began to recognize family policy as a pressing problem only since the passing of the 1993 law banning abortion (Golinowska interview, 2010). Our research confirms this general conclusion but also points out the significant role of lay Catholic activists, representing not just a few NGOs but a rather diverse spectrum of opinion that nevertheless more recently tends to agree at least on the basic goal of protecting working mothers and young families with children. Indeed, the recent secularizing trends in the Polish society made it necessary for the policymakers to reconcile deeply ingrained religious views on this subject, expressed by some segments of the political elite, with the reality of generational

<sup>33</sup> One of the founding members of the group, Teresa Kapela, is a long-time activist of the pro-life movement in Poland.

<sup>34</sup> In the summer of 2011, after an unsuccessful attempt to lead her own small party, she joined the opposition Civic Platform (PO).

change and its preference for a consumer oriented, neo-liberal vision of a family and motherhood recognizing a wide array of life choices.<sup>35</sup> As a result, not only the government but also many NGOs, some leaning to the right, others to the left, must now carefully navigate this changing terrain to both preserve their old associations and win new supporters among the younger generation.

It is important to note that the left-leaning social organizations, just like the mainstream social policy establishment before them, have seemed unable to offer a working and credible alternative family policy proposals, different from the ones offered by the center-right, and even the populists. Similar to the hierarchy of the Catholic Church, Polish feminists have focused mostly on abortion and related questions but lack effective backing from a wide social movement that could capture public attention and steer the social policy debate toward a more social-democratic direction. Initially, in the 1990s and the early 2000s the crucial momentum was lost when the SLD governments ignored both the demographic challenges and the feminist demands for gender equality (Golinowska, interview 2010). Polish women's groups and feminist activists alike openly recognized the importance of family policy only three years after the adoption of the Kluzik-Rostkowska's family program, but concentrated mainly on institutional childcare, forming temporary alliances with teachers' and nurses' unions.<sup>36</sup> This move, however, created additional obstacles to any collaboration with the centrist or center-right groups since both labor organizations vigorously opposed new laws on nurseries and early education or kindergarten services (Szumlicz, interview 2010; Komeński Calendarium 2010, Ogrodzińska, interview

<sup>35</sup> For the best illustration of this trend see a commercial website for mothers that turns the old religiously inspired label of the self-sacrificing "Polish Mother" (Matka Polka) into a savvy marketing tool for young parents – *Nowa Matka Polka* – "New Polish Mother." <http://www.nowamatkapolka.pl/>

<sup>36</sup> One of the authors of this paper observed the annual Women's Day demonstration on May 8, 2010 (*Manifa 2010*) where family policy issues were addressed for the first time in a prominent way jointly by feminist organizations and the unions. See also *Warszawa-Manifa 2010*.

2010).

As opposed to nurseries, kindergarten received little attention from the three groups discussed above. Still, as Table 3 shows, in the last decade Poland made substantial gains in this area. We can attribute them almost exclusively to two national NGOs, the Komeński Foundation for Children and the Federation of Educational Initiatives.<sup>37</sup> Moreover, while all previously mentioned activities and proposals have focused almost exclusively on the urban population and middle class families<sup>38</sup> as the target of their pronatalist efforts, these nonprofits represent a rare example of successful lobbying on behalf of the long-neglected Polish countryside. The Komeński foundation also stands out as a key player in family policy reform due to its unique focus on child wellbeing and a pivotal role in passing the August 2007 law on the alternative forms of kindergarten education with a special focus on small towns and villages.<sup>39</sup> Closely allied with the former opposition but now a dominant governing party, the Civic Platform (PO), in the following few years this group managed to ensure successful implementation of the legislation in close collaboration with the Ministry of Education. Detailed examination of their activities, based on interviews with the leaders of both organizations, reveals that despite many obstacles such as the initial opposition from the ministry and especially the teacher's unions and allied left-leaning groups, a deliberate centrist strategy, crucial political alliances, and largely non-controversial goals contributed greatly to their success (Komeński Calendarium 2010, Ogrodzińska, Kozińska, interviews 2009-10). A crucial turning point occurred already in 2004,

<sup>37</sup> In Polish *Fundacja na Rzecz Dzieci im. Komeńskiego* and *Federacja Inicjatyw Oświatowych* (an association of affiliated groups working on behalf of child education and development in rural areas), see <http://www.frd.org.pl/en> and <http://fio.org.pl/>.

<sup>38</sup> The 2007 Program stresses “special needs of large families and rural families” but its policy recommendations benefit largely the working parents and children in the urban areas.

<sup>39</sup> Based largely on the Portuguese example and initial support from the US-based organizations. (Ogrodzińska, interview 2009).

during the EU accession negotiations, when with the help of strategically placed Polish governmental officials, the Komeński Foundation was able to secure substantial funding from the regional development funds rather than conventional social development money that typically supports other family policy initiatives (Komeński Calendarium 2010).

The placement of kindergarten services firmly on the educational and rural development agenda, rather the family policy one, produced significant path departure that translates into noticeable gains for families and working women.<sup>40</sup> As a result of all these converging efforts, aided greatly by newly released EU assistance, Polish family policy made a large leap into the future but not without some serious drawbacks. First, the most recent reform efforts revealed serious institutional and economic weaknesses of the Polish state as it struggled to respond to both the demographic and poverty challenges with comprehensive packages of family-oriented programs after decades of neglect in this area. All parties had to acknowledge that the country would not be able to afford either universal family benefits or free, widely accessible childcare in the foreseeable future. Second, as we could see, costly, controversial, and often-counterproductive populist measures, once adopted might be impossible to reverse, at least in the short run. Finally, almost total marginalization of the left, social-democratic perspective and the demise of the traditional social policy community's influence on family policy came at the expense of the poor who lost an important, even if not always effective advocate at the central level of government. The empowerment of the local governments and NGOs often benefits the

<sup>40</sup> Compulsory, free, and centrally funded education is planned to cover all four-year olds by 2016 ("Subwencja na przedszkola," [www.samorzad.pap.pl](http://www.samorzad.pap.pl). 24 November 2010, accessed July 18, 2011). Kindergartens now increasingly admit 2 year olds. Meanwhile many nurseries and day-care centers are expected to admit children as young as 6 months. If implemented, this will measurably relieve the pressure on young mothers to find reliable childcare.

wealthier regions while leaving many rural areas and poor urban ghettos further behind.<sup>41</sup>

## **HUNGARY: Failed Attempts at Path Departure and a Return of Conservative Family Policy**

In contrast to Poland, which only recently began to recognize this area as a national priority, during the first decade of the 2000s Hungary has remained a world leader in family policies, with spending surpassing three per cent of the GDP (OECD 2007)<sup>42</sup> (see also **Table 3**). The fact that parental leaves, almost exclusively utilized by women, still constitute the single largest program backed by virtually all political forces and the larger public illustrates the lasting power of historical legacies of the 1960s and the 1980s. Also, similar to earlier periods, cash transfers have continued to dominate over childcare services. In particular, government support of nurseries ranks at the bottom in Europe, although it is still higher than Poland or Romania (Ibid.). Long childcare leaves, intended to keep women at home, also make it especially difficult to overcome the problem of extremely low employment rate among mothers - 46.3 per cent as compared to above 56 per cent both in Romania and Poland in 2008 (OECD 2010). Thus, following EU accession Hungary finds itself in a very difficult position as it struggles to comply with the so-called Lisbon goals of female labor activation.<sup>43</sup>

By 2011, the postcommunist version of the conservative, pronatalist consensus on the general direction and goals of family policy became firmly entrenched and consolidated. First,

<sup>41</sup> For example, the ZDR 3+ located its headquarters in Grodzisk Mazowiecki, the richest small municipality in Poland whereas impoverished areas such as the Warsaw district of Praga are served by tiny NGOs with limited access not only to the central government but also to the local authorities (Benedykciński, Krupska, Pokój, interviews, 2010).

<sup>42</sup> Hungary's spending on maternity and parental leaves, when calculated per child, and as a percentage of the per capita GDP is the largest in Europe (OECD 2007. Chart PF7.2.).

<sup>43</sup> The 2000 Lisbon Strategy set the aim of above 60% female employment rate (European Council, Lisbon, March 2000 [http://www.europarl.europa.eu/summits/lis1\\_en.htm](http://www.europarl.europa.eu/summits/lis1_en.htm) (last accessed: September 2011)).

the defeat of the liberal, and later also fledgling social democratic ideational alternatives during the mid-1990s and early 2000s eliminated potential chances for a major path departure. Second, advancing processes of domestic political change and the EU accession increased the visibility, and in some cases also the political clout, of new actors such as NGOs and local governments who largely supported the continuation of generous family policies. Finally, the replication of the institutional structure of the Hungarian welfare state, where family policy schemes always occupied a special, privileged position, often immune from fiscal, administrative, and political pressures that regularly plagued pension and health insurance systems, enabled the preservation and restoration of traditional approaches, regardless of several notable adjustments in a few key programs.

Even though during the past decade Hungary, in contrast to Poland but similar to Romania, entered a difficult period of slow growth, recession, and fiscal austerity, again political reasons, rather than economic ones eventually determined the family agenda of the 2000s for conservative and left-wing political forces alike. It is true that succeeding governments (even before 1989) found it cheaper to pay mothers for care work than extend childcare services. Yet, parental leaves also served the larger purpose of legitimization of government's inability, and also unwillingness, to address hidden unemployment of women who faced severe disadvantages on the labor market. Feminist critics have argued that the weak political representation of women, both inside and outside of the government, made it easier for (male) politicians to preserve traditional gender roles also by means of family policies (Pascall&Kwak 2005). Indeed, the percentage of female legislators currently (2011) ranks second lowest in Europe after Malta (8.8%) and, after the recent government restructuring by the Fidesz-led coalition, Hungary has no women ministers (Koncz 2011).

Since the fall of communism the first Orbán-cabinet (1998-2002) was the most consistent in designing and implementing of conservative family policies. These included most significantly family tax credits and the restoration of the childcare benefits -- GYES and GYED, curtailed by the previous socialist-liberal coalition under the Bokros austerity plan (Lakner 2005; Gyarmati 2010). After regaining power in 2002 the Socialists (ex-communists) found it extremely difficult to change this policy orientation. Instead of a direct attack on the conservative welfare state, the government led by the former central banker, Péter Medgyessy, announced a “welfare turn” to increase living standards of the entire population.<sup>44</sup> Neither the rhetoric nor the measures contained in this program aimed to undermine Orbán’s family policies. The Minister of Social Affairs, Judit Csehák, who had participated in social policy planning since the mid-1970s, justified the decision to increase family allowances by 20% and the introduction of the “13<sup>th</sup> month family payment” by declaring that “[O]ur family policy can become really successful if more people decide to have children and if the decision to have children no longer carries the risk of poverty” (Gyarmati 2010, 70.) In conjunction with this policy, birth grants went up to 225% of the minimum pension.<sup>45</sup> Furthermore, in a move interpreted by some experts as an indication of the social-democratic preferences of the new government, school attendance was no longer required as a precondition to receiving family allowances, which restored full access to this program by all families with children.<sup>46</sup> More serious attempts to alter patterns of redistribution of cash transfers to benefit low-income households materialized much later, under the two succeeding Socialist governments of Ferenc Gyurcsány (2005-2010).

<sup>44</sup> The so called „100 days program” consisted of various welfare measures including the 50% increase in the salaries of civil servants.

<sup>45</sup> Birth grant rose from 150% of the minimum pension to appr. the minimum wage. 2002. évi XXXIII. törvény, see also Table 3.

<sup>46</sup> 2002. évi XXXIII. törvény a családok támogatásáról szóló 1998. évi LXXXIV. törvény módosításáról.



Accession to the EU, implemented in May 2004 by the Medgyessy cabinet, opened up new opportunities for outside influence on Hungarian family policies in at least three areas, also evident in Poland and Romania during the same period: the development of a national strategy for social inclusion of marginalized social groups (required under the Open Method of Coordination – OMC), female labor activation, and the related issue of “gender mainstreaming.”<sup>47</sup> All these involved potential EU funding to support new policies at the national and local levels. For the first time the ministry in charge (together with other stakeholders) was obliged to supply regular reports on social inequalities, poverty and marginalization, and had to provide detailed plans to tackle social problems. In Hungary, a low level of maternal employment emerged as the major problem, in conjunction with the shortage of nurseries - the two areas handled by the labor and health ministries (Ministry of Labor (Hungary) 2004.) “Gender mainstreaming” became the main responsibility of the newly established Secretariat of Equal Opportunities within the Ministry of Labor under Katalin Lévai<sup>48</sup> already in 1996, focusing on the preparation for EU-accession in relation to equal rights and opportunities of women, the disabled, and the Roma minority.<sup>49</sup> The Secretariat set up a consultative body consisting of civil organizations and experts, and prepared relevant legislative drafts<sup>50</sup> (Juhász, interview 2010). Initially all major political parties accepted this agenda but in 2010 the second Orbán government cancelled all work related to gender equality at the ministerial level.

The utilization of badly needed international funding began with the PHARE Programs

<sup>47</sup> Gender mainstreaming aims to coordinate all policies and funding within the EU to facilitate equality between men and women.

<sup>48</sup> Social policy expert, former editor of the social policy journal “Esély” (Chance), currently a Socialist Member of the European Parliament.

<sup>49</sup> According to notes of Zsuzsanna Sebestyén, Advisor of the Ministry of National Resources, former member of the Secretariat, 2011.

<sup>50</sup> Books published by the Secretariat (partly in English) are listed on their old homepage: <http://www.szmm.gov.hu/main.php?folderID=16283> (accessed on the 10<sup>th</sup> August, 2011.)

before the accession, which was also present in Poland early on. After 2004, all funded projects had to comply with gender mainstreaming and the National Action Plan of Social Inclusion (NAP). In this way, financial assistance was provided for mothers who completed GYES to get back to work (through the European Social Fund, ESF) and to renovate kindergartens and nurseries (through the European Regional Development Fund, ERDF). As of 2011, however, the outcomes of these efforts have yet not been properly evaluated (Kósa, interview 2010).<sup>51</sup>

The government of Ferenc Gyurcsány, in power since September 2004, concentrated primarily on family allowances, and much less on gender equality, in his program of welfare improvements that included a 50% exemption of social insurance contribution for employers of women returning from GYES and GYED<sup>52</sup> and a law allowing mothers on GYES to work full-time after the first birthday of their child.<sup>53</sup> While having a positive effect on the employment of mothers this measure further diminished the value of the program as an income-substitute and reduced it to the level of mere social assistance, now mostly paid to low-income families. As opposed to the conservatives whose family policy was explicitly segmented according to social class, during 2005-2006 the new left-wing government proposed a new unifying concept, signaling once again a possible reorientation of the ex-communists from a liberal to a more social democratic direction. Family allowance was doubled for all the families to demonstrate government's commitment to a "just society." The left-wing social policy experts who started to work on the "welfare turn" (*jóléti fordulat*) already under Medgyessy, welcomed Gyurcsány's

<sup>51</sup> Between 2004 and 2006 EU money was going to directly to ministries. A new National Development Agency was created (*Nemzeti Fejlesztési Ügynökség*) since 2007 (Esther Kósa, interview 2010).

<sup>52</sup> Called the "Start Plus" program, administered by the employment offices.

<sup>53</sup> 2005. évi CXXXVI. törvény a családtámogatási rendszer átalakításáról. (Act on the Reform of the Family Policy System.)

preference for social-democratic universalism.<sup>54</sup> Zsuzsa Ferge, for example, stressed the positive effects of decreasing the weight of discretionary social assistance and thus increasing targeting of child-related transfers (Ferge 2006: 130). At the same time independent economists, Benedek and Scharle, added credibility to this approach by demonstrating that the reform actually benefitted all strata of society, including the worse-off (Benedek and Scharle 2006: 265). The new calculation of welfare assistance, implemented under Minister of Social Affairs, Kinga Göncz, also favored poor families.<sup>55</sup> From 2005 the number and status of family members was taken into account both when setting the threshold for eligibility and the level of provision.<sup>56</sup> This move, however, received widespread criticism especially from municipalities as the payment to large families (above five children) with two unemployed adults exceeded the minimum wage. In the end, the calculation remained family-based but the maximum amount of social assistance for one family was soon limited to the level below the minimum wage.<sup>57</sup> Meanwhile, the extension of childcare services proceeded through an administrative measure that obliged all cities above 10,000 inhabitants to run a nursery.<sup>58</sup> Nonetheless, the ratio of enrolled children remained at the same level of 10-11% throughout the tenure of all left-wing governments in clear contradiction to “social-democratic” preferences promoted by domestic left-wing experts and also the Barcelona Directives of the EU<sup>59</sup> (**Table 3**; Központi Statisztikai Hivatal 2002-2008).

<sup>54</sup> No less than 60 policy papers were produced under the so called „SZOLID” project providing background information for the this turn..having an impact also on Gyurcsány’s family policy measures. See: <http://www.szmm.gov.hu/main.php?folderID=872> (17. July, 2011.)

<sup>55</sup> Kinga Göncz was a funding member of the Department of Social Policy and Social Work at Eötvös University in 1991 with a leadership of Prof Zsuzsa Ferge.

<sup>56</sup> 2005. évi CLXX tv. a szociális törvény módosításáról.

<sup>57</sup> 2006. évi CXVII. törvény az egyes szociális tárgyú törvények módosításáról.

<sup>58</sup> Out of the appr. 3200 settlements in Hungary 164 are above 10,000 inhabitants.

<sup>59</sup> See ft. 29 above.

After the left-wing won again in the 2006 parliamentary elections, Gyurcsány intensified social democratic trends in family policy reforms. By placing the reduction of inequalities and the fight against child poverty in the center of his program he received enthusiastic support from the iconic figure of Hungarian social policy, Professor Zsuzsa Ferge. Indeed the Prime Minister fulfilled her long-term wish to establish a Center for Child Poverty (*Gyermekszegénység Program Iroda, GYEP*) under the Hungarian Academy of Sciences. Foreign inspiration for this program came from the new left welfare agenda in Britain of the 1990s. The Center developed a long-term national strategy to eliminate child poverty within 25 years, accepted by the Parliament in 2007 (“Making it Better” 2007). A short-term program for immediate action soon followed (MTA 2006). Two issues lay at the center of this strategy: the employment of parents as the best protection against child poverty and the development of childcare institutions as integrating and developing centers, especially for poor children. The Center started pilot projects in the remote areas of Hungary with similar methodology as the “Sure Start” programs in the UK (*Biztos Kezdet Program*). Newly created “Children’s Houses” (*Gyerekház*) now combined care with social work directed at their parents and a complex set of activities (Scheer, interview 2010).<sup>60</sup> Still, even though in March 2006 the Prime Minister declared 80 billion HUF for the implementation of the short-term program,<sup>61</sup> the political backing for this initiative weakened already in 2007, and resources fell short of expectations. Five regional anti-poverty projects, however, obtained EU funds, with another six currently (2011) applying.<sup>62</sup>

Even before the outbreak of the global financial crisis in 2008 the Gyurcsány cabinet began

<sup>60</sup> The complex pilot-project also included the setting up of social co-operatives, IT-centers, afternoon-care for school children etc. (MTA. 2010.)

<sup>61</sup> The announcement of the short term strategy by the the Prime Minister in the Hungarian Academy of Sciences. <http://www.szmm.gov.hu/main.php?folderID=1055&articleID=5951&ctag=articlelist&iid=1> (17th July, 2011.)

<sup>62</sup> Funding is provided through the Structural Funds’ Hungarian program called TÁMOP 5.2.3. (Farkas, interview 2010.)

to slowly abandon the original, egalitarian goals of fighting child poverty. With the appointment of Erika Szűcs as Minister of Social Affairs in the spring of 2008 (following the break with their Liberal coalition partner – the SZDSZ), the central government gave way to the pressure of socialist-run municipalities to impose more restrictive welfare policy towards the poor.<sup>63</sup> New legislation under a minority cabinet stigmatized, rather than assisted the poor under a general agenda to regain electoral support from the middle class before the next elections. Kindergarten policy followed a similar pattern. The government offered a new financial incentive (*óvodáztatási támogatás*)<sup>64</sup> in the amount of 10,000 HUF granted twice a year (in June and in December) to poor families who registered in a kindergarten while failing to introduce pedagogical and social programs for the integration of poor and Roma children (Autonómia 2010).<sup>65</sup>

Although Gyurcsány's popularity fell dramatically after the "lying scandal" and the subsequent demonstrations and riots in Budapest during 2006, he remained in power until the spring of 2009.<sup>66</sup> The opposition refused to recognize his legitimacy but also was powerless to remove him from office before the end of the term. His temporary successor, interim Prime Minister, Gordon Bajnai, concentrated mainly on "crisis management" and proceeded to restrict family policies by terminating indexation of universal and means-tested social transfers. Thus, GYES and family allowances lost 15% of real value by 2010 (Ferge&Darvas 2010: 19). The

<sup>63</sup> Erika Szűcs was a vice-major of the Municipality of Miskolc, a former industrial city in the north-eastern Hungary before joining the cabinet. Miskolc opted for continued segregation rather than integration of the Roma and the poor children. 65% of the children attending schools for the disabled (*speciális gyógypedagógiai iskola*) were Roma in 2005 (Zolnay 2006: 55)

<sup>64</sup> Act 2008. XXXI. on reforms to foster equal chances in public education.

<sup>65</sup> A conference on "Conditional Cash Transfers around the World and in Hungary" was organized by TÁRKI and the World Bank in the Spring of 2010, where this program was evaluated by Mária Herczog, sociologist. [http://www.tarki.hu/en/news/2010/items/20100510\\_en.html](http://www.tarki.hu/en/news/2010/items/20100510_en.html)

<sup>66</sup> From November 2006, FIDESZ and the Christian Democrats boycotted parliamentary debates.

latter benefit now applied only until the 20<sup>th</sup>, rather than 23<sup>rd</sup> birthday with many university students losing eligibility. Moreover, a stricter version of the Orbán's legislation of 1998 now curtailed benefit rights of parents whose children failed to register for school.<sup>67</sup> Again, the Roma minority appear to have been the major target of this policy change. Cuts in extended parental leaves were also proposed, including reduction of the earnings-related GYED to one year and GYES to two years. The joint lobbying effort of women's organizations, however, succeeded in blocking the former change, while the latter, concerning mostly lower income families, was adopted (Juhász, interview 2010).<sup>68</sup> In this way the middle class bias of postcommunist Hungarian family policy now became evident equally on both sides of the political spectrum. The crystallization of a two-track system is illustrated well by the continuously higher amount of earnings-related parental leave (GYED) over the flat-rate leave (GYES), the latter being utilized by non-employed mothers with worse labor market position (**Table 3**). Nevertheless, continuation of the traditional conservative agenda during this second period of serious economic crisis<sup>69</sup> created new dilemmas. For example, the government was pressured to provide more and better childcare institutions for working families and struggled how to do this on the cheap. Similar to Poland, Hungary was obliged to report to the EU on the issue of nurseries, and had to be mindful of its domestic constituency that had been used to almost universal access to kindergartens. Therefore, a compromise solution emerged, resembling the most recent proposals adopted in Poland. Kindergartens in settlements below 10,000

<sup>67</sup> In contrast to previous laws under the Conservative government, this legislation came with sanctions. Half of the family allowance had could be provided in kind in case of non-attendance.

<sup>68</sup> Our interviewee talked about an unprecedented union of three very different women's umbrella organizations for the protection of GYED. The petition was signed by the Hungarian branch of European Women's Lobby (*Női Érdekvédelem Szövetsége*), the Hungarian Women's Association (*Magyar Nők Szövetsége* and the Association of Hungarian Wives (*Magyar Asszonyszövetség*). (Juhász, interview 2010).

<sup>69</sup> The first one occurred in 1990-1996.

inhabitants could now admit two-year-olds, thus creating “kindergarten-nurseries” facilities (*ovi-bölcsi*).<sup>70</sup> The number of such institutions is growing (118 in 2011) in small villages where the municipality has no capacity to run an independent nursery (Központi Statisztikai 2011).

After the April 2010 elections the conservative party-alliance of FIDESZ and KDNP controlled a supermajority of  $\frac{3}{4}$  of the parliament. The new Orbán government immediately announced the „real turn of the system” (*valódi rendszerváltás*) as a whole, questioning the legitimacy of the previous efforts to build a new political and economic regime after the collapse of communism.<sup>71</sup> Yet, surprisingly, the initial, very general program of the party-coalition issued in March 2010 contained social and family policy ideas that largely coincided with the proposals of previous governments. For example, it stated that *[t] he essence of our family policy is that every family counts. We have to help the poorest families who are in danger of losing their homes and the middle class who are in danger of sliding down into poverty.*<sup>72</sup> A more detailed, new family policy legislation that was forthcoming according to the Secretary of State of Social Affairs has not emerged as of this writing (September 2011). Most importantly, despite opposition protests, a new Constitution of April 2011<sup>73</sup> declares state protection of the institution of family defined exclusively as a marriage of a man and a woman and the fetus from the moment of conception<sup>74</sup> while it omits the previous more general reference to the right of

<sup>70</sup> This legislation has been in effect since September 2009. Amendment of the LXXIX. Act on Public Education. This measure was vigorously contested in the media, with nursery professionals showing the most opposition.

<sup>71</sup> They claimed that the previous Socialist-Liberal coalition (2006-2010) was illegitimate and never broke with the communist system.

<sup>72</sup> Resembling Gyurcsány’s slogan „No child is left behind”. See FIDESZ 2010.

<sup>73</sup> The new Constitution will become law on 1<sup>st</sup> January 2012. Two-thirds parliamentary majority enabled FIDESZ to amend the Constitution several times during the fall of 2010, and adopt a new one on the first anniversary of their victory, without seeking a national consensus or opposition support. The latter boycotted the process.

<sup>74</sup> Already in the autumn of 2010 the Socialists tried to rally international support against the conservative family policies of the ruling coalition. The Friedrich Ebert Stiftung Budapest office, together with other European Socialists organized a conference entitled “Banning abortion and women back in the kitchen? The Family policy of the government is worrying. Life and death is at stake.” (Kojer, 2010. )

every citizen to receive social protection.

The internal agreement of the supersized coalition now in power in Budapest had ceded, somewhat unexpectedly, the responsibility for family policy and education policy to the minority partner – the Christian Democrats (KDNP).<sup>75</sup> It is important to note that family policy now became explicitly separated from the rest of the welfare state in a move that closely resembles the MDF preference of the early 1990s. Now, for many experts social policy became synonymous with anti-poverty policy. The prominent role of the KDNP in this institutional context highlights some crucial differences in family policy orientations between the two coalition partners, which may be also a deliberate attempt to alleviate potential opposition to an increasingly controversial, conservative agenda. FIDESZ has been more inclined to maintain a pro-choice policy where mothers would receive assistance to decide whether to stay at home with their children or to work (FIDESZ 2007) but KDNP has consistently stressed low fertility rates and the “crisis” of the family, with a clear bias in favor of traditional gender roles (KDNP 2008). In this sense the split within the Hungarian right-wing forces resembles the coalitional politics in Poland during the mid-2000s when more extreme, populist parties wielded disproportionate influence over the family policy agenda. The Orbán government also restored longer two-year (GYED) and three year (GYES) parental leaves cut by the Bajnai-cabinet. At the same time, the amount of GYES, not indexed since 2009, remained the same.<sup>76</sup> The possibility to work full-time while on GYES (introduced by the Gyurcsány-government) was restricted to

<sup>75</sup> In the new governmental structure these areas are run by different Secretariats within the Ministry of National Resources (*Nemzeti Erőforrások Minisztérium, NEFMI*) and also the Ministry of Administration and Justice (*Közigazgatási és Igazságügyi Minisztérium, KIM*). Health care and pensions have been delegated to FIDESZ. A major reform of the pension-system was carried out in the Autumn of 2010, nationalizing the private pension funds under the Ministry of National Economy (*Nemzetgazdasági Minisztérium*).

<sup>76</sup> 28.500 HUF, which equals minimum pension.



30-hours employment after the first birthday of the child.<sup>77</sup> These measures were paradoxically interpreted as an “increase of choice” of mothers and “new possibilities” of reconciliation of work and family. In fact, so far the reform plans have paid little attention to gender equality while strengthening traditional male and female roles and privileging wealthier families.<sup>78</sup> Confronted with the necessity to work within a broader, EU-driven agenda, the new Secretary of State, Christian Democrat Miklós Soltész, declared official support for the idea of reconciliation of work and care but only when it did not conflict with the “*wish of Hungarian women*” to stay at home with their children.<sup>79</sup>

Progressing consolidation of conservative trends has been the most visible not only in long parental leaves (GYED) and family allowances but also in the new tax system. Under Fidesz, the tax reform signaled an unprecedented turn towards the well to do at expense of the poor. Introduction of the flat 16% income tax rate was combined with generous credits for working families. A typical tax paying family with one or two children would be able to write off 10,000 HUF/month per child, whereas a family with three or more children would gain 33,000 HUF/month/ per child (see **Table 3**). Large families, especially those with one high earner or two earners, thus can keep approximately an equivalent of half of the minimum wage for every child, all this on top of the universally available family allowance.<sup>80</sup> Meanwhile, no special compensation or negative taxation for poor families was introduced. On the contrary, the previous (non-family based) tax-allowance (*adójóvátírás*) for low-income groups was

<sup>77</sup> A small change in the calculation of maternity leave (FGYÁS) has also occurred. The period of sick-leave would no longer count as employment, affecting especially women who had health problems during pregnancy.

<sup>78</sup> After the assumed adoption of the Constitution in 2012, several new, “core acts” (*sarkalatos törvények*), including one on family policy, are forthcoming.

<sup>79</sup> Interview with the vice Secretary of State, Imre Nyitrai on the partial privatization of nurseries. (Matalin 2011.)

<sup>80</sup> All families still receive family allowance (2011) in the amount of 1 child with two parents: 12,200 HUF; 2 children with two parents: 13,300 HUF; 3 children and two parents: 16,000 HUF/child/month.

dramatically reduced and will be stopped from January 2012.<sup>81</sup> Many observers agree that this policy came as no surprise in view of the ideas long championed by some prominent Christian Democratic experts, for example, Zoltán Lakner, who described the promotion of higher income groups as one of the central aims of family policies on the ground that fertility rates of these segments of society were the lowest and needed special government attention to benefit society as a whole (Lakner, interview 2010).<sup>82</sup>

In addition to a gradual but unmistakable convergence toward traditional, fertility-driven family policy, increased “behavioral” controls over poor families became a tendency shared by “left” and “right” over the long run. Disciplinary measures restricting access to family allowances, started by Orbán in 1998, expanded further under Bajnai, and carried over to the second Fidesz government. Beginning in the fall of 2010 the benefit can be suspended at the discretion of a municipal clerk in case a child would not show up at school on more than 50 occasions. The money is to be kept on a separate account and provided for the family in case parents would be able to send the child to school. While conditional cash-transfers (CCT) received national and international attention recently, this social policy tool only seems to work in case it is provided as a new transfer and is accompanied by social work or mentoring,<sup>83</sup> which do not exist yet. These measures demonstrate government’s reluctance to address the problem of Roma and rural underdevelopment with more sophisticated social policy measures. In contrast, in recognition of the growing importance of middle-class constituencies in both

<sup>81</sup> Altogether 41.8% of families are worse off with the new system, 20% would experience no substantial change, and 38.2% would gain according to the calculations of the Central Bank of Hungary. To be able to get the maximum family tax break one has to earn 487,000 HUF/month which is 2.5 times the average wage.

<sup>82</sup> Lakner, Zoltán Lehel was Secretary of State both under the Antall-and the first Orbán-cabinet, and he is a chief-advisor (*fiőtanácsadó*) in the Ministry of Administration and Justice, Department of Social Integration (*társadalmi felzárkózás*) of the second Orbán-government.

<sup>83</sup> See Fiszbein&Schady, 2010.

urban and rural areas, childcare policies became much more flexible. While the actual expansion of nurseries remained on paper, the government made similar concessions to what occurred in Poland and made it easier to fund family day-care centers (*családi napközi, CSANA*). It also urged municipalities above 10,000 inhabitants (obliged to run nurseries) to develop these new, smaller and cheaper, institutions designed to care for a maximum of seven children, but with a substantial cost to the parents.<sup>84</sup>

At the same time, in the first half of 2011 Hungary put family policy in the center of its EU presidency, with an official goal to elevate the problem of demography and corresponding family policies to the top of the European agenda.<sup>85</sup> At the opening of the “Week of the Family,” the Hungarian Secretary of State suggested that this topic had long remained a taboo in the European Union, and now his country, as the main champion of these issues experienced serious “tensions” while negotiating the agenda of the Presidency with the European Commission in Brussels. “*‘Strong Europe’ he emphasized, is only to be reached by solving the problem of economic growth and of demography.*”<sup>86</sup> Prime Minister Viktor Orbán soon followed suit by stating that “*Europe can not build its future on immigration -- it has to reverse demographic trends in order to maintain its international competitiveness.*”<sup>87</sup> This sentence summarizes well the last ten years of family policy development in Hungary, when path dependence has dominated over path departure, with only few noticeable adjustments. The first and the second governments of Viktor

<sup>84</sup> 268,200 HUF/child/year has been allocated for these centers in 2011 while the costs are around 850.000 HUF. (Blaskó et al 2009). The rate for parents contribution vary, but are usually above 40,000 HUF/month. (Appr. two-thirds of the minimum wage.)

<sup>85</sup> The events were organized by the Secretariat of Family Policy [*Családpolitikai Főosztály*] of the Ministry of National Resources, the head of which is Mrs Kormosné, Zsuzsa Debreceni, who earlier served as the social policy expert of the Organization for Large Families, and was interviewed in this position by the authors (Kormosné, interview 2010).

<sup>86</sup> One of the authors was present at the on the Hungarian Presidency Expert Conference “Reconciliation of Work and Family Life – Its effect on Demographic Processes,” in Hungarian Academy of Sciences in Budapest, 28-29 March, 2011.

<sup>87</sup> Report on the Informal Meeting of Ministers responsible for demography and family policy issues, held in Gödöllő on 1 April 2011. <http://www.eu2011.hu/news/orban-eu-should-not-build-its-future-immigration>

Orbán resembled communist family policies of the 1960s and the 1980s with their focus on fertility rates, but also included new measures such as family tax credits and child-related social assistance. Left-wing governments made a few, mostly unsuccessful attempts to break with this tradition, first by changing the focus from fertility rates to fighting the poverty of children (2004-2007), and second, by reducing long parental leaves again during the economic downturn (2008-2010). Nevertheless, none of these measures resulted in any lasting reorientation of the family policy agenda in the social-democratic or even a neo-liberal direction. A key lynchpin of the “left-wing” social agenda at the EU level - promotion of gender equality and labor mobilization of women has been especially weak in Hungary despite the accession to the EU in 2004. Instead, the new Orbán government has openly expressed its preference for traditional families and measures to promote childbearing among the higher income groups. Analyzed from this angle, the consolidation of traditional conservative policies in Hungary in the late 2000s allows us to detect a few notable elements of convergence at the ideational and policy levels, but not in terms of the actual institutions and expenditures, with Poland and to some extent also with much poorer Romania as the latter two countries strive to forge a new type of family policy consensus.

### **ROMANIA -- Creating a New Family Policy Consensus, 2000-2010**

By the early 2000s, high levels of long-term unemployment, low real incomes, public deficit, and the lingering problems of child neglect and poverty dominated the political agenda in Romania (Popescu, 2004a and 2004b; Preda et.al., 2006; World Bank, 2007; Stănculescu and Pop, 2009; ICCV, 2010). Even though EU accession highlighted social inclusion of vulnerable groups and child protection, government’s actions have been fragmented and riddled with bureaucratic hurdles. At least from the 1990s until 2003, family policies maintained their twofold

orientation resting on two institutional pillars, the insurance-based, earnings-related benefits for working parents during maternity and childcare leave paid from the Social Insurance Fund, and the universal financial benefits for all children paid from the central budget. Between 2003-2009, however, slow but steady economic recovery opened up opportunities for more complex policy approaches with increased attention to differential fertility, migration, child-poverty, and mothers' early return to work. Pronatalist incentives were explicitly designed to target the emergent urban middle-class but an additional, means-tested family allowance was also introduced in 2003, followed by a substantial increase of the universal allowance for children below the age of two in 2007. Demographic concerns reiterated, yet no single comprehensive family policy plan emerged. Rather, multiple additions to the already existing programs focused on either flat rate or earnings-related methods to provide standard cash benefits. After 2009, the policy responses to the deepening financial crisis fragmented the provision of cash transfers for families and dismantled in-kind benefits for infants.

During the last months of its 2000-2004 mandate, the “social-democratic” government (PSDR/PSD) of Adrian Năstase replaced the supplementary allowance for large families, introduced in 1997 by the former democratic convention - CDR.<sup>88</sup> The amounts of the new means-tested supplementary benefits for couples with children (*alocație complementară pentru familiile cu copii*) and lone-parent families (*alocație de susținere pentru familia monoparentală*) were low, yet somewhat higher for the latter category. In both cases, the amounts flattened after the fourth child, with a clear message to discourage families to have more children than they

<sup>88</sup> The Romanian Democratic Convention (Convenția Democrată Română – CDR) was a political alliance between the National Liberal Party, the National Peasant's Party and other “right-wing” parties, constituted in 1991 in opposition to the National Salvation Front, the political body that formed the Social Democratic Party (PSDR, later PSD) led by Ion Iliescu, president of Romania between 1990-1996 and 2000-2004.

could afford to bring up.<sup>89</sup> Eligibility depended on social inquiries conducted every six months, and parents had to present a proof of school attendance every three months at the local welfare office. Yet, for the first time, the law acknowledged the more vulnerable situation of single-parent families and granted them slightly higher benefits. In 2000-2001 Romania, 17% of children lived in single-parent families, as compared to 21% in both Hungary and Poland (European Commission 2008a, 23, Table 5). In 2007, however, the poverty rate of lone-parent families was 31%, as compared to 21% overall in the case of families with children (*Report of the Presidential Commission for the Analysis of Social and Demographic Risks* 2009, 16). The law generated strong opposition from the new liberal-democratic coalition “Truth and Justice” – DA that came back to power in December 2004<sup>90</sup> with a promise to implement more equitable system of cash transfers for families with children, that reward previous insurance contributions. Nonetheless, in practice the government of Călin Popescu Tăriceanu not only kept the means-tested family allowance and work-related childcare benefits in place, but also rejected the

<sup>89</sup> The eligibility threshold was initially set at around 50 € per family member per month (following the threshold of relative poverty), which was considerably higher than the corresponding threshold for claiming social assistance benefits under the law on the Minimum Income Guarantee (Law 416/2001). Between 2003 and 2009, the eligibility threshold and the values of the benefits were indexed annually through governmental ordinances. Starting from 2009, the eligibility threshold was set somewhat higher, at the minimum net national wage. But the amounts remained rather low: in 2010, needy families with four or more children received a monthly complementary allowance of 17 €/family, whereas lone-parent families with four or more children 22 €/family. For families on the Minimum Income Guarantee, the value of the benefit was increased by 15%.

<sup>90</sup> In order to secure winning the 2004 elections against the Social Democratic Party (*Partidul Social Democrat* – PSD, led by the prime-minister Adrian Năstase and the president Ion Iliescu), the National Liberal Party (*Partidul Național Liberal* – PNL, led by the future prime-minister Călin Popescu Tăriceanu) and the Democratic Party (*Partidul Democrat* – PD, led by the forthcoming president Traian Băsescu and prime-minister Emil Boc) constituted the political alliance “Justice and Truth” (“Dreptate și Adevăr” – DA, meaning “Yes”) that eventually won the 2004 elections. However, due to the tensions between the two political leaders, the alliance broke up in 2007 and during the last period of the mandate (2007-2008) PNL governed in coalition with the Democratic Alliance of Hungarians from Romania (*Uniunea Democratică a Maghiarilor din România* – UDMR). In 2008, the Democratic Party (PD) changed its name into Liberal-Democratic Party (*Partidul Democrat-Liberal* – PDL) and decided to compete alone in the 2008 elections. The new government, appointed in December 2008, was headed by Emil Boc (PDL) and it was formed by PDL and PSD, in coalition with the small and ideologically volatile Conservative Party (*Partidul Conservator* – PC, led by Dan Voiculescu, the owner of an influential TV channel that allegedly brought his political capital; the party changed its name from *Humanist Party* in 2004). The Boc government (known as “Boc-1” government) fell after a censure motion on the 13<sup>th</sup> of October 2009, initiated by PNL and UDMR, the first successful censure motion after 1990. However, Emil Boc (PDL) maintained his position as a prime minister of the new government (known as “Boc-2”, mandate 2009-2012) formed by PDL and UDMR.

principle of social insurance financing altogether and moved the benefit payment to the central budget (O.U.G. 148/2005). Parents now could opt to return to work at any time during the childcare leave, and receive a financial “stimulant” (monthly amount) at approximately one-quarter of the flat-rate benefit. Although often criticized for favoring low-income families instead of the middle-class, the law remained unchanged until 2009, when the childcare benefit became once again earnings-related (Law 239/2009). The benefits were computed at 85% of the average income during the last 12 months of employment prior to childbirth, but a minimum (equal to the gross minimum wage) and a maximum (6.7 times higher than the gross minimum wage, i.e. 1,000 Euro/month). The “stimulant” for women who return to work early was maintained, but the number of parents using it dropped sharply (Romanian Ministry of Labor, Family and Social Protection 2010a, Graph 11, 9).

The same liberal government increased the amount of the universal family allowance to approximately 50 Euro/month in the case of children below the age of two (three for disabled children) (O.U.G. 148/2005). In practical terms, the higher allowance for infants played a role similar to the Hungarian GYES, yet it was the right of children (and not their parents). In this way, the twofold institutional and ideational legacy that emphasized conditional, work-related parenting benefits and universal child-protection (via cash allowances) continued to exert influence throughout the 2000s. Following the incipient economic recovery of 2005-2006, a new in-kind benefit, and “trousseau for newborn” was introduced in December 2006 (Law 482/2006). Unlike the birth grant, which was limited to the first four children of the mother, the trousseau was universal, but due to serious problems with implementation at the local level, it was soon replaced with a flat cash payment (O.G. 3/2007, approved by Law 606/2007), then unified with the birth grant at the beginning of 2010 (O.G. 5/2010) and finally abrogated along with the birth

grant, as part of the 2010 austerity measures (Law 118/2010).

*The policy process: main sources of recent changes in Romanian family policy*

Although Romania established various expert commissions and organized several public consultations with social partners, academics, and stakeholders, the impact of their recommendations, including the *National Commission for Population and Development* and the *Presidential Commission for Social and Demographic Risks*, remained weak,<sup>91</sup> scattered across ministries, and hardly detectable, especially at the local level. Governmental programs included special chapters on family policies, but they were brief and very general. The scarcity of skilled technocrats in the decision-making structures and administration, a sharp contrast with Poland and Hungary,<sup>92</sup> hindered policy reforms, even though, in comparison to other ministries, the Ministry of Labor has been more collaborative and more experienced in running international projects.<sup>93</sup> Furthermore, the coexistence of administrative decentralization and direct central-financing of all family benefits (except maternity) exacerbated tensions between local and central authorities, as the latter imposed complicated control mechanisms of cash flows from the central budget that requested high administration costs, in particular personnel and logistics, which were nevertheless supported from the local budgets. Eligibility and the claiming process<sup>94</sup> followed national guidelines, and national authorities, through their county-level offices, performed occasional audits in order to detect frauds and limit local-level discretion. In November 2008,

<sup>91</sup> Preda, interview 2010.

<sup>92</sup> Ibid.

<sup>93</sup> Ernu, interview 2010.

<sup>94</sup> Although universal, family allowance ought to be claimed at the local welfare office, along with the birth grant, the support-allowance for needy families is granted only after a social inquiry at the residence of claimants, following the methodological norms similar to those of the Minimum Income Guarantee (Law 416/2001, with its subsequent modifications) and imputing various household assets and agricultural property.



with the help of international consultants, the *National Agency for the Payment of Social Benefits (Agenția Națională pentru Plăți)*<sup>95</sup> and its county-level territorial offices were created along with a whole new logistical infrastructure for financial accountability. Local authorities, especially those in smaller rural areas already overwhelmed by existing administrative duties, could hardly afford to hire more staff in order to meet the new requirements. This situation caused delays in benefit payments (especially the means-tested support allowance for needy families) and also in the statistical reporting to the central administration.

Nurseries and kindergartens remained under the administration of local authorities, but were co-financed from the central budget within a bloc grant for social spending, supposed to also cover the costs of other social programs.<sup>96</sup> Local authorities were expected to share funding, offer social services, or outsource them, and also to apply for EU funds in order to create or develop infrastructure. As a result, economic rationale started to dominate in the development of local social programs and disparities between municipalities increased.<sup>97</sup> Yet cost-effectiveness remained a distant goal<sup>98</sup> and social entrepreneurship, a new phenomenon in the Romanian context, developed unevenly (*Romanian Ministry of Labor, Family and Social Protection* 2010b; Fleacă, interview 2010).

In the context of persistent focus on child welfare and child poverty, the pronatalist, conservative discourse in favor of large families failed to generate public support in Romania,

<sup>95</sup> The *National Agency for the Payment of Social Benefits* ([www.prestatii sociale.ro](http://www.prestatii sociale.ro)) coordinates the payment of all family allowances, childcare and social assistance benefits and elaborates statistical reports on their implementation. The structure and logistic system used by the Agency (SAPHIR program) was developed in collaboration with Bernard Brunhes International (BBI) and allows to track beneficiaries based on their personal identification number (*cod numeric personal - CNP*).

<sup>96</sup> The bloc grant should cover the costs of the salaries of personal assistance of disabled persons, maternal assistants (foster parents), social aid, reparations of public facilities, and the payment of social assistance benefits granted under the law on the Minimum Income Guarantee (Law 416/2001, with its subsequent modifications), and also the maintenance of nurseries.

<sup>97</sup> Fleacă, interview 2010.

<sup>98</sup> Ibid.

comparable to what occurred in Hungary or Poland. The Orthodox Church, officially representing 90% of the population (*Romanian National Census, 2002*), and playing a prominent role in elections, refrained from pushing this issue onto the public agenda. This might be explained by the lack of civic activism of the Orthodox clergy in general, who tend to obtain economic privileges through backdoor elite negotiations, and possibly also by the absence of strong, religiously inspired “mother-figures” in politics, who could convincingly promote traditional family models (similar to the *Association of Large Families 3+* in Poland and *NOE* in Hungary). The Romanian Orthodox Church, however, holds indirect power, mainly through the expectations of political leaders to garner the support of the clergy. For instance, the Law 396/2006 on the financial benefit of 200 Euro at first marriage<sup>99</sup>, introduced by the liberal government, clearly followed a conservative Christian social agenda. The only Romanian organization that participates in the major pronatalist initiatives at the European level is the „Vladimir Ghika” Association of Catholic Families, also present on the European Family Platform,<sup>100</sup> where Hungarian organizations are in the avant-garde.

### *The emergence of demographic concerns on the family policy agenda of the 2000s*

Demographic concerns, overshadowed during the 1990s and early 2000 by economic problems, re-entered the public agenda in 2006-2007, but they did not gain the “emergency” status identifiable in Poland and Hungary during the same period. Instead, open discussions of massive labor migrations and preoccupations with differential fertility among the social strata (Ghețău 2004), including economically deprived Roma communities (Fleck&Rughiniș 2008; Raț

<sup>99</sup> Legea 396/2006 privind Prima la Căsătorie. It was the only law that established the value of a benefit in European currency (Euro). The benefit was abrogated by Law 118/2010, as part of the austerity measures.

<sup>100</sup> Bărbuț, interview 2010. The association has links with the pro-life movement, yet the attitude of the president is much more moderate and critical towards radical forms of anti-abortion protests.

2010) penetrated family policies, and reframed policy approaches but without refocusing attention from the persistent problems of child poverty and scarcity of public childcare services. In 2004, the social-democratic government of PSD established a *National Commission on Population Problems (Comisia Națională pe Probleme de Populație - H.G. 939/2004)*, under the direct jurisdiction of the prime minister<sup>101</sup>, in order to produce demographic studies<sup>102</sup> and issue policy recommendations. In 2005, the government of the liberal-democratic coalition DA renamed the commission the *National Commission for Population and Development (Comisia Națională pentru Populație și Dezvoltare – H.G. 648/July 2005, modified by H.G. 620/2009)*, but maintained its consultative role under the prime minister.<sup>103</sup> In 2006 the Commission prepared a *Green Paper on the Population (Cartea Verde a Populației)*<sup>104</sup>, which was presented at the *International Population Conference: “The Population of Romania – Quo Vadis?” (Populația României – Încotro?)*, organized in 2007 in Sibiu under the auspices of the *United Nations Population Fund*. The main discussion focused on the steady population decline since 1992, with an annual average rate of - .15%, outflows of labor migration and high-rates of non-wage earning women (homemakers and unpaid family workers, especially in rural areas). The Ministry emphasized labor activation of women, preventing frequent “interruptions due to giving

<sup>101</sup> The Commission had 18 members, half from relevant ministries (labour, health, culture, education) and the rest from public research institutes and universities (see H.G. 939/2004).

<sup>102</sup> Most notably, the *Gender and Generations* panel survey, that commenced in 2005, with the aims to provide comparable data for social and demographic policies for the United Nations Economic Commission for Europe (UNECE). Hungary, Poland and Romania were all included in the first wave of the survey. At the moment of writing (August 2011), micro-data is available for Hungary and Romania, yet not for Poland. See: <http://www.ggp-i.org/>

<sup>103</sup> It has no autonomous legal status and consists of representatives of the relevant ministries, the *National Institute of Statistics*, and academics from the main public universities, altogether 18 experts. These members work pro bono, and academics outnumbered governmental officials until 2009 (H.G. 620/2009).

<sup>104</sup> The *Green Paper on the Population* was written in 2006 by an interdisciplinary group of experts in the fields of demography, social policies, health policies and population statistics, coordinated by the National Commission on Population and Development functioning within the Ministry of Labor, Family and Social Solidarity. The foreword was signed by Maria Muga, at that time state secretary from the Ministry of Labor. The document analyzed social and demographic data and set policy recommendations based on public consultations with representatives of civil society organizations, research and academic institutions (National Commission on Population and Development 2006).

birth,” and stimulating fertility through the “flexibilization of the system”, so as to allow women to work and care for their preschool-age children. Furthermore, “women with children in high risk communities ought to receive additional support, mainly by means of social assistance services” (*Green Paper on the Population* 2006, 30). Although the wording of the *Green Paper* reveals the institutional inertia through its focus on promoting maternity and protecting “women with children,” the final document of the conference showed a clear shift in emphasis towards a more conservative preference for traditional families. It stresses “the necessity [to develop] services and benefits for families, the reconstruction of the status and prestige of families with children (...), [and] the analysis of the efficiency of current measures aimed at increasing natality” (*Report on the Population Conference in Sibiu* 2007, 4, authors’ translation from Romanian).

The report also pointed out that the increase of natality was intrinsically linked to the return of temporary labor migrants<sup>105</sup> (Dumitru Sandu’s emphasis in the *Report on the Population Conference in Sibiu*, 2007). The contradiction between the mid-term economic profitability of labor migration, as remittances sent home sustained a consumption-lead economic growth and served as a buffer against an even harsher impoverishment of rural areas, and the long-term negative effects on demographic balance and “human capital” became obvious by 2007. Working abroad represented a “solution” especially for “the children of the decree” (“decreșii”, i.e. the larger cohorts born after Ceaușescu’s anti-abortion decree 770/1966), in their twenties at the time of regime-change and heavily affected by unemployment during the transition.<sup>106</sup> Out-migration of this large segment of the potential fertile population would

<sup>105</sup> The highest numbers of Romanian migrant workers can be found in Spain, Italy, and Germany (Sandu, 2010; Anghel and Horvath, 2009).

<sup>106</sup> Preda, interview 2010. See also Popescu, 2004a.

eventually lead to the necessity to import foreign labor force, thus changing the ethnic composition of the country.<sup>107</sup>

This debate contributed significantly to the renewal of preoccupation with benefit improvements for working families with small children, made feasible also because of a modest but perceptible economic growth (ICCV, 2010). Eventually, however, new social problems piled on the pre-existing ones. First, the problem of migrants' "home alone" children, who were left in the care of the extended family (most often grandparents) or non-relatives from the local community, pushed back forcefully on the public agenda the issue of child neglect, with its psychological and educational consequences, and it became a main topic of the report of the *Report of the Presidential Commission for the Analysis of Social and Demographic Risks (PCSDR)* in October 2009. Data provided by the *National Authority for the Protection of Child Rights* in September 2008 indicated that 96,580 children had at least one parent working abroad, and one-third of them (30,297 children) had both parents absent (PCSDR 2009, 38). The 2008 report of the Soros Foundation showed similar figures (Soros Foundation 2008). Following these reports, the *Presidential Commission* recommended the expansion of public childcare services (kindergartens and day-care centers), with priority access to young mothers and single parents (PCSDR, 2009). Second, the problem of high fertility among economically deprived Roma, especially in the context of the declining population as whole, has become another key feature of the ongoing discourse on family policy, backed by leading demographers:

<sup>107</sup> Demographic concerns received increased attention from the mass media in 2007-2008, with the occasion of the *International Population Conference* in Sibiu, 2007. Interviewed by one of the major Romanian newspapers (*Cotidianul*, 6 June 2007), the ex-minister of finance, Mircea Ciumara, at that time general director of the *National Institute for Economic Research* of the *Romanian Academy*, declared that "the current danger is not that Romania could become depopulated, but that it could be de-Romanianized [*de românișă*]" after an import of workers from China or Pakistan. Daniel Dăianu, also ex-minister of finance and president of the *Institute for Innovation and Development Projects*, also warned about the dangers of ghettoization and social conflicts, in case of a large inflow of foreign labour from China and Pakistan. Paul Păcuraru, at that time Minister of Labor, acknowledged the deficit of labour force, and said that successful pro-natalist policies implemented by other EU countries should be analysed (Source: Crăciun, Oana (2007): „România în 2050: Ghetouri de chinezi și de pakistanezi” [Romania in 2050: Ghettos of Chinese and Pakistanees]. *Cotidianul*, 6 June 2007).

“[T]his is a reality. I wouldn’t say that it is specific to Romania. Differential fertility exists in every country. But in our case the magnitude of the difference between the fertility of women with higher educational credentials and those with medium, primary or no education at all is much larger. Whereas women with university degrees have one child, those with basic education have three.” (Prof. Vasile Ghețău, the director of the Centre for Demographic Research “Vladimir Trebici”, member of the *National Commission on Population and Development*, and the *Presidential Commission for the Analysis of Social and Demographic Risks*. Interview fragment from *Adevărul*, 24 September 2007, authors’ translation).<sup>108</sup>

This particular statement has an obvious ethnic dimension, since it is a well-established fact that among the Roma minority in Romania the traditional model of large family prevails (Fleck and Rughiniș, 2008; Raț, 2010).

### *Support for working families and the middle-class bias*

The most recent controversies surround the necessity to reduce social expenditures due to the worldwide economic crisis that has affected Romania no less seriously than the much richer Hungary since 2008. After only a few years of relative prosperity and expansion of benefits, the criteria of “deservingness” became the main focus of attention. The government of Emil Boc restated earlier proposals to change the universal child allowance into a selective and progressive benefit (higher for low-income families),<sup>109</sup> and advocated the return to a flat-rate child-care

<sup>108</sup> Iordache, Sorin and Zaharia, Nicoleta (2007): “De ce nu mai fac copii românele?” [Why Romanian women have babies no longer?] *Adevărul*, 24 August 2007.

<sup>109</sup> The draft of the proposal on changing the family allowance passed the Senate in October 2009, but its revised

benefit, set at around 150 Euro/month. Debates on these proposals generated wide media coverage and allow us to scrutinize the mechanisms of public legitimization of expenditures from the central budget based on two different rationales: universality (in the case of child allowance) and contribution (in the case of childcare benefit during parental leave). The Ministry of Labor and various civil society organizations repeatedly defended universality of child allowance<sup>110</sup> against the means-testing proposals coming from the World Bank (1992, 1997, 2003), citing the lack of cost-effectiveness as one of the main reasons.<sup>111</sup> Moreover, in 2005, the Constitutional Court decided that it was unconstitutional to require school attendance as a condition for this payment *at any age below 18* and the legislation was changed accordingly (O.U.G. 148/2005). Introducing income-test for family allowances would have involved the modification of Article 49 of the Romanian Constitution (2003), which affirms that the state is responsible for the welfare of children and each child is entitled to state support. It was also inconsistent with the already existing means-tested benefits for families with children (O.U.G. 105/2003) and hard to implement due to the scarcity of personnel at the local level and the fluctuation of earnings. During the Parliamentary debates (Deputies' Chamber, 23<sup>rd</sup> of February 2010) the head of the PDL Women Organization (allegedly not consulted by the Minister beforehand) and the opposition parties effectively defended the universality principle.<sup>112</sup>

In May 2010, the government "austerity package," negotiated with International

version reached the public agenda only in February 2010, when it entered the Deputies' Chamber.

<sup>110</sup> Interview with George Roman, director of Save the Children Romania, 11 June 2010, Bucharest; Interviews with Izabella Popa and \_\_\_\_ Adina, officials from the National Authority for the Protection of Child Rights, June 2010, Bucharest.

<sup>111</sup> Călin Popescu Tăriceanu, at that time prime-minister from PNL, declared that he does not need money from the state in order to raise his daughters, and that the uniform amount of the benefit actually creates discrimination. His statement was heavily criticized by NGOs active in child protection, most notably *Save the Children*.

<sup>112</sup> See the transcripts of the 23 February 2011 debates in the Deputies' Chamber, <http://m.cameradeputatilor.ro/pls/steno/steno.stenograma?ids=6760&cidl=1> (June 2010)

Monetary Fund (IMF),<sup>113</sup> included ten measures, three of which concerned directly families with children: the return to a flat-rate childcare benefit during a parental leave (c. 150 Euro/month, equal with the minimum gross wage), the abolition of the trousseau for the newborns, and a 15% cut in the support allowance for needy families with children.<sup>114</sup> In the next few days, women representatives of the major political parties attacked the first proposal but seldom mentioned the other two. The subsequent media debate concentrated almost exclusively on maintaining the earnings-related of the childcare benefits for working parents. The leader of the ruling PDL Women Organization herself<sup>115</sup> commented that the government should find other methods of cutting social spending (which was admittedly necessary), than reducing child allowances and childcare benefits. Protests of mothers with children were organized in Bucharest on May 16 and 18 when around 1,000 parents with small children gathered in front of the Ministry of Labor, bringing sacks with used pampers, and 21,000 persons signed an on-line

<sup>113</sup> The IMF declared that they did not impose a certain “austerity package” to the Romanian Government, but that it was the decision of the government what types of measures would be most effective to reduce public spending and meet the IMF criteria to qualify for the fifth IMF loan, planned for June 2010. The IMF actually granted the loan on the 3<sup>rd</sup> of July 2010, after the Romanian Government implemented a revised version of the initial program (the Constitutional Court decided that cutting pensions by 15% was anti-constitutional, therefore the government maintained pensions but increased the VAT from 19% to 24%). Sources: The Press Releases of the Romanian Government ([www.gov.ro](http://www.gov.ro)) and the International Monetary Found ([www.imf.org](http://www.imf.org)): Press Release 10/280 and 09/148).

For the initial declaration of the Romanian Prime Minister on the “austerity package” see:

[http://www.gov.ro/prime-minister-has-argued-that-the-executive-has-opted-to-cut-budget-spending-for-at-least-two-reasons-not-to-further-stifle-the-economic\\_12a109224.html](http://www.gov.ro/prime-minister-has-argued-that-the-executive-has-opted-to-cut-budget-spending-for-at-least-two-reasons-not-to-further-stifle-the-economic_12a109224.html) (June 2010)

<sup>114</sup> According to the estimations of the Ministry of Labor, 36% of the children live in families receiving either the complementary allowance or the sustenance allowance for single-parent families; there is a big discrepancy between rural and urban areas: whereas for children in urban areas the average coverage of the benefit is 18%, in rural areas the coverage is 54% (Ministry of Labor, Family and Social Protection, 2010). The amount of the benefit is very small: for a family with two children, the complementary allowance is only around 15 Euro/month, which equals with 12.7% of the minimum net wage.

<sup>115</sup> Sulfina Barbu, 15 May 2010, [www.hotnews.ro](http://www.hotnews.ro). Sulfina Barbu was the head of the PD-L Women Organization and eventually became Minister of Labor, Family and Social Protection in September 2011.



protest petition.<sup>116</sup>

This type of high protest mobilization, and especially one involving so many mothers with small children was unprecedented for Romania. It clearly showcased the emerging political clout of the nascent urban middle class. The proposed modification of the childcare benefit was framed as being “against all mothers”, although, as a matter of fact, the flattening of the benefit affected only 15% of beneficiaries from urban areas, and less than 7% from the rural, while the rest were anyway receiving the minimum amount (Romanian Ministry of Labor 2009a, Table 2, 2). Large numbers of mothers did not qualify for the benefit at all because they lacked formal labor contracts.<sup>117</sup> The advocates of maintaining the earnings-related childcare benefits defended its contributory character even though it actually had been financed from the central budget. While praising young, middle class women for defending their social rights as mothers, major Romanian newspapers criticized the “work avoidance” and “dependency” of the recipients of social assistance benefits,<sup>118</sup> illustrating their arguments with photos of “poor families” that portray mothers surrounded by five-six children, whose slightly darker skin marked them as belonging to the Roma ethnicity. The final list of austerity measures was presented in June 2010, and the government assumed responsibility for them before the Parliament, emphasizing that

<sup>116</sup> “The Pampers Strike”, *România Liberă*, 14<sup>th</sup> of May 2010, <http://www.romanioliberal.ro/actualitate/eveniment/greva-pampersilor-186578.html>

<sup>117</sup> In 2009, 10% of the occupied women in Romania had the status of “unpaid family worker”, which is different from “homemaker”, yet does not qualify them to receiving contributory benefits such as maternity or paid child care leave (*Anuarul Statistic al României*, 2010).

<sup>118</sup> Based on the number of on-line visualizations and forum comments, two articles were particularly popular: “Romanians whose profession is to receive social assistance” (Sorin Semeniuc: “Români de profesie asistați social”, *Evenimentul zilei*, 14 May 2010) and “Fifty Ways through which the state encourages worklessness” (Mariana Bechir: “50 de moduri prin care statul incurajeaza nemunca” de Mariana Bechir, *Adevarul*, 6 April 2010). Both articles framed the situation of families with children in the “welfare dependent underclass” approach, with allusions to the situation of the Roma minority, allegedly guilty of improper attitude to work and irresponsible fertility behaviour.

there were no cuts either child allowances or in child care benefits.<sup>119</sup> Nevertheless, the birth grant and the trousseau for the new-borns were eliminated (Law 118/2010), while the earnings-relatedness of the child-care benefit was maintained at the cost of 15% cut in the amount and, correspondingly, lowering the upper-limit from 1,000 to around 830 €/month (Law 118/2010). In December 2010, the policy was changed again by a governmental emergency ordinance (O.U.G. 111/2010): tight conditions on work record<sup>120</sup> and earnings-relatedness were maintained, and parents could opt for either a one-year leave with a maximum benefit of roughly six times the minimum gross wage, or a two-year leave with a lower ceiling, i.e. twice the minimum gross wage.<sup>121</sup> All these changes were incorporated in the reform strategy of the social assistance system, designed by the Ministry of Labor (2011b) and endorsed by the government in March 2011, which sets as its main goals the reduction of social expenditures by 0.78% in 2013, better targeting, reduction of administration costs and decreasing the number of beneficiaries who are up-to-work.<sup>122</sup>

<sup>119</sup> See the discourse of prime minister Emil Boc, 7<sup>th</sup> of June 2010, Romanian Parliament: <http://www.mediafax.ro/politic/emil-boc-la-asumarea-raspunderii-pe-legile-austeritatii-nimeni-nu-a-estimat-acest-val-al-crizei-6309855>

<sup>120</sup> There are certain situations that can be assimilated to working status: full-time students, registered unemployed during the first 6-9 months, while still receiving benefits, parents on maternity or child care leave, parents on sickness leave, receiving invalidity benefits or state pensions (Law 240/2009, modified by Law 118/2010 and O.U.G. 111/2010).

<sup>121</sup> The governmental emergency ordinance O.U.G. 111/December 201 on paid child care leave applies only for those who enter child-care leave after the 1<sup>st</sup> of January 2011 (those who had already been on child care leave are not affected by the new regulations). According to the new regulations, parents may choose between: A). Staying on paid child care leave uninterruptedly for two years and receiving a monthly benefit computed as 75% of their previous wage, but ranging from 600 lei to 1,200 lei. B). Staying on paid child care leave only for one year and receiving a monthly benefit computed as 75% of their previous wage, but ranging from 600 lei to 3,400 lei. In case that they return to job at any time before the ending of the first year of paid child care leave, they receive a monthly stimulant (bonus) of 500 lei until the child becomes two years old (or three years, in case of children with disabilities). However, they might opt for not returning to job and staying on unpaid childcare leave (their social security and health-care contributions are paid from the state budget). Parents must choose between option A. or B. from the very beginning, they cannot combine the two. Only parents who opted for B. have the right to obtain the “stimulant” for returning to job. Employers have the obligation to maintain the employment of parents returning from child-care leave to their previous job for at least six months.

<sup>122</sup> Romanian Ministry of Labor, Family and Social Protection. 2011b. *Strategia privind reforma în domeniul asistenței sociale (The Reform Strategy in the Domain of Social Assistance)*. <http://www.mmuncii.ro/ro/articole/2011-03-10/strategia-privind-reforma-in-domeniul-asistentei-sociale-din-romania-2011-2013-2083-articol.html> (May 2011).

In sum, after EU accession in 2007, Romania found itself under both international and domestic pressures to reorient policies towards increasing fertility while avoiding child poverty, and promoting reasonable balance between professional and family duties. This meant considerable path departure from the sole preoccupation with children's rights and poverty, which characterized the early years of transition. The newest policy turns, slowly but perceptibly, converge towards European social insurance standards, at least in the area of contributory benefits (expanded maternity and child-care rights) and subsidies for crèches and kindergartens, all targeting working parents. Yet, the universal family allowance has been subsequently challenged and barely indexed, except from introducing a higher amount for infants in 2007 that somewhat compensates uninsured parents. The birth grant and newborns' trousseau, however, were revoked on grounds of financial austerity. At the ideational level, surviving elements of the old state paternalism, fortified by anti-Roma sentiments, resurfaced in the attempts to control natality among the low-income families with irregular employment. In sum, the increasing demands of the emergent urban middle class conflicted with the neoliberal measures adopted during the financial crisis. As a result the working, mostly urban families have fortified their privileged position while low-income ones suffered due to the loss of some universal benefits and tightened eligibility rules.

## **Conclusion**

Our disaggregated analysis of family policy developments reveals the emergence of new opportunities for path departure in all three countries, with political agency (including policy entrepreneurs) (Cook 2007), and ideational shifts (Schmidt 2009) playing major roles. In addition to conventional players such as the ministries of labor, finance, trade unions, social

insurance administrations, and leaders of major political parties with active social policy agendas, we identified several new, and increasingly powerful actors. These include individual and group policy entrepreneurs such as Joanna Kluzik-Rostkowska in Poland, organizations of large families in Poland and Hungary, and local government activists and middle class women in Romania. They skillfully exploited various domestic political channels and newly available international assistance from the European Union (social and regional development funds) to influence policy change but often in ways that fall short of complete path departure. Poland represents the only example of an attempted “paradigmatic” shift in family policy across the board, dealing with several major program areas at once. Nevertheless, we also emphasize that in all instances, even the most powerful players faced formidable obstacles in the form of institutional legacies of preexisting programs with their entrenched legal, financial, administrative and also ideational underpinnings.

**Hypothesis 2** stipulated that sustained pressures from various domestic and international sources would fall short of a complete convergence to a common “European” or perhaps even “Central European” model of family policy. Despite significant and growing similarities in two major areas of family policy -- Bismarckian maternity insurance and early education -- our findings largely confirm this assumption. The most consistent improvements shared by all three countries in the areas of Bismarckian maternity insurance, tax deductions, and subsidized child-care services have overwhelmingly benefitted working (insured and taxpaying) families, including emerging urban middle classes with the greatest political influence. At the same time, significant policy change such as the introduction of new benefits (tax credits) or the recent expansion of kindergarten services (early education) in Poland and Romania, often takes place either on the margins of, or even completely outside of the conventional boundaries of family

policy. In contrast, long-term path dependence has remained visible everywhere in maternity insurance, with Poland, and especially Romania, gradually catching up with Hungary in terms of the length and coverage. Arguably, only the EU mandated paternity leaves for fathers, if more widely used, could potentially constitute a radical, internationally induced departure from past practices in this area. Paradoxically, Poland also illustrates the lingering power of historical legacies that lurk behind the most ambitious, postcommunist policy reform efforts to date - the maternity leave which became a major element of emergency policy-making already during the early 1970s crisis resurfaced in a similar “emergency” role in the failed reforms of the early 2000s, and most recently yet gain in the 2007 Family Policy Program that turned it into a lynchpin of the new pronatalist social agenda.

Family (or child) allowances, the preferred European type of cash transfers to families with children, display the most variation across the three countries, a pattern that becomes even more entrenched throughout the 2000s. This tendency especially compels us to question the extent and depth of actual social policy convergence across the region. This program also illustrates the contingent nature of path dependent processes, much weaker in Poland, where the universal allowances for all working (insured) families disappeared already 1995 along with the system of centrally controlled, “emergency” wage redistribution that ceased to operate following the collapse of the command economy (see Part I of this study). A further comparison with Hungary and Romania enables us to detect the crucial role of timing and context- i.e. the incorporation of traditional cash allowances into the early system of pronatalist family policy- as the most powerful assurance against radical change in the future. In addition, by 1989 both countries, but not Poland, have already relied so much on this form of income redistribution to families (see **Table 3**) that it became an almost indispensable form of safety net during the

economic crisis of the 1990s and also later in the 2000s. Therefore, during repeated economic crises of post communism Hungary and Romania could both successfully resist World Bank advice to introduce means testing by stressing actual anti-poverty effects of these universal payments.

Long-term childcare leaves and benefits display similar variation and path dependent effects, also increasing over time, with Hungary and Poland showing the most consistency on the opposite side of the spectrum. The former has successfully resisted various attempts to significantly alter or reduce the generous GYES and GYED programs that since the 1960s and 1980s became the key pillars of national, pronatalist family policy. The latter country maintained the strict distinction between the unpaid leave for all insured employees and a paid leave for a limited number of workingwomen from low-income families. In contrast, Romania undoubtedly experienced a significant path departure in this area by introducing this type of program for the first time in late 1990s and continuing to run it through the 2000s according to the GYED (social insurance) model. Although this excluded many mothers without a solid record of full time participation in the labor force, it nonetheless constitutes a significant move toward a more complete system of protection. Our research demonstrates that in contrast to previous periods where pronatalist concerns almost totally dominated the Romanian family policy agenda, this time the introduction of parental leaves should be attributed primarily to a combination of economic (rising unemployment of women) and international factors (additional pressure to expand children's rights). We must also add that since 1990 in Romania, as opposed to Poland and Hungary, family policy has become decisively child-oriented, as opposed to family-oriented.

This brings us to **Hypothesis 3** and its stipulation about the influence of ideational factors, and especially the emergence of a new, consensual welfare discourse as the best

guarantee for a resolution of the conflicting pressures of residual state paternalism (and *conservative familialism*), imported neoliberalism (welfare residualism and *implicit familialism*), and aspirational social democratic models. We detected the presence of all these tendencies in each country after 1989 and especially during the 2000s, at the time of EU accession. Everywhere governments, entrepreneurs, and sometimes also emergent interest groups made serious attempts to expand or reduce various family policy schemes in line with at least one of these models. So far, however, despite visible domestic and also international influences, key social-democratic (and EU-promoted) policy concerns such as gender equality, social inclusion, and increased childcare opportunities for infants (nurseries), received only token attention, mostly visible on the margins, for example in parental leaves for fathers, and at the local level (various EU-funded training programs and facilities for children, especially in the rural areas). Nursery care especially suffered from continued neglect, greatly exacerbated by the accumulated legacies of state socialism, i.e. post-Stalinist (and post-Ceausescu) policy of rejecting institutional care for 0-3 year olds in favor of home care (relying on childcare leaves in Hungary but mostly on grandmothers in Poland and Romania).

Instead, from 2000 we observe an accelerated merger of conservative, pronatalist ideologies with the neoliberal emphasis on individual rights reserved primarily for working families, emerging urban middle classes, and individual workingwomen. This combination has been the most visible in Poland since the adoption of the 2007 Family Policy Program. Nonetheless, similar tendencies surfaced even in much poorer Romania, with the strengthening of the many earnings-related cash transfers and the expansion of childcare options in urban areas. In contrast, since 2009 Hungary under the Orban cabinet reinforced traditional state paternalism and social conservatism following the failure of both neoliberal and social democratic reforms

under the discredited ex-communist governments and their allies. Relative success and continued high levels of spending for family cash transfers, even if now benefiting more the Hungarian middle classes than the poor, combined with high rates of kindergarten attendance, helped this country to make a strong case, domestically and across Europe, against the need for any substantial changes in this area, except for some temporary austerity measures in times of crisis. Finally, the continued salience of demography, now also present for the first time in Poland as a major ideational driver beyond family policy legislation, appears to have reinforced rather than hindered many of the pre-existing institutions and policy patterns across the postcommunist region. While many new schemes such as birth grants, tax credits, and innovative forms of local assistance to poor families may look like revolutionary changes on their own, assembled together within the larger institutional and ideational context of family policy as a whole they constantly bounce against formidable obstacles constructed decades ago. We suggest that only when national family policies become significantly less reliant on traditional social insurance and, in case of Romania and Hungary also on the well-consolidated employment-related budgetary cash transfers such as family allowance and childcare leaves, and embrace non-traditional goals, now supported by the new middle classes, such as the well-being of children and care opportunities for working mothers we might witness significant cumulative path departure in the years to come.



## Appendix

**Table 3: Key Indicators of Family Policy Program Development in Poland, Hungary and Romania, 1989, 2000, and 2010.**

	POLAND			HUNGARY			ROMANIA		
FAMILY ALLOWANCE	1989	2000	2010	1989	2000	2010	1989	2000	2010
<i>Eligibility</i>	universal	means-tested	means-tested	universal	universal <sup>i</sup>	Quasi-universal <sup>ii</sup>	Employed parents with permanent work contract	Quasi-universal <sup>iii</sup> , and a supplement for three or more children	Universal and a means-tested supplement
<i>Payment criteria</i>	According (acc.) to income	Acc. to the number of children	Acc. to the age of children	Acc. to the number and rank of children + higher for disabled child and lone mother	Acc. to the number and rank of children + higher for disabled child and lone mother	Acc. to the number and of children + higher for disabled child and lone mother	Acc. to the number and rank of the children, parents' income and residence in urban or rural	Acc. to the number of children, conditioned by school-attendance, double for disabled child	Acc. to the number of children, double for disabled child; means-tested for the additional support-allowance
<i>Average amount for two children (% of average gross wage)</i>	8%	4.7%	2.2%	30.6%	10.7%	13.3%	18.3% <sup>iv</sup>	6.2 %	Universal allowance: 4.3% <sup>v</sup> Means-tested allowance: 3.0%
<i>Expenditures on family allowance - % GDP</i>	2% (family allow. & nursing benefits only)	0.6% (family allow. & nursing benefits only)	0.3% (2009) (family allow.&nursing benefit only)	3.1%	1.0%	1.4% (2009)	1.2% of GDP (only family allowances, excluding maternity)	0.5% (all family allowances, universal and supplementary)	0.7 % (all family allowances, universal and means-tested)
<i>Financing</i>	Employers and Social Insurance Fund	Central State Budget	Central State Budget	Social Insurance	Central State Budget	Central State Budget	Central state budget	Central state budget	Central state budget

MATERNITY LEAVES AND BENEFITS	POLAND			HUNGARY			ROMANIA		
	1989	2000	2010	1989	2000	2010	1989	2000	2010
<i>Length of leave</i>	Insured employee <i>16 weeks</i> (18-26 weeks for next and multiple births)	Insured employee <i>16 weeks</i> (18-26 weeks for next and multiple births)	Insured employee <i>22 weeks</i> (34-41 weeks for next and multiple births <sup>vi</sup> )	Insured employee <i>20 weeks</i> (24 for next and multiple births)	Insured employee <i>24 weeks</i>	Insured employee <i>24 weeks</i>	Insured employee <i>16 weeks</i> (112 days)	Insured employee <i>18 weeks</i> (126 days)	Insured employee <i>18 weeks</i> (126 days)
<i>Benefit replacement rate- (% of insured wage/salary)</i>	100%	100%	100%	100%	100%	100%	50-85% (according to work record)	85%	85%
<i>Financing</i>	Social Insurance Fund	Social Insurance Fund	Social Insurance Fund	Social Insurance Fund	Social Insurance Fund	Social Insurance Fund	Social Insurance Fund	National Pension and Other Social Insurance Fund	National Health Social Insurance Fund

	POLAND			HUNGARY			ROMANIA		
CHILD-CARE LEAVES AND BENEFITS	1989	2000	2010	1989	2000	2010	1989	2000	2010
<i>Eligibility</i>	employee	employee and self-employed	employee and self-employed	Universal (Gyes) Employee (Gyed)	Universal (Gyes) Employee (Gyed)	Universal (Gyes) Employee (Gyed)	No benefit	Employee and self-employed (insured and paid income tax during the last 12 months)	Employee and self-employed (insured and paid income tax during the last 12 months)
<i>Max. length (age of the child)</i>	3 years 36 months to be used within 4 years	3 years 36 months to be used within 4 years	3 years 36 months to be used within 4 years	3 years (Gyes) 2 years (Gyed)	3 years (Gyes) 2 years (Gyed)	3 years (Gyes) 2 years (Gyed)	n.a.	2 years (3 years for disabled children)	2 years (3 years for disabled children)
<i>Benefit amount</i>	100% lowest wage – low income families only	20% average wage – means-tested	22% aver. Wage-means-tested	31% of average wage (Gyes) 70% of previous wage + amount maximized at 50% of average wage (Gyed)	Equals minimum pension, 18% of average wage (Gyes) 70% of previous wage + amount maximized at 50% of average wage (Gyed)	Equals minimum pension, 13% of average wage (Gyes) 70% of previous wage + amount maximized 50% of average wage (Gyed) <sup>vii</sup>	n.a.	85% of insured income	85% of insured income, varying between a minimum of 600 lei and a maximum of 3400 lei <sup>viii</sup>
<i>Financing</i>	Social Insurance	Central State Budget (from 1999)	Central State Budget	Social Insurance	Central State Budget (Gyes + Gyed)	Central State Budget (Gyes+ Gyed)	n.a.	National Pension and Other Social Insurance Fund	Central State Budget

BIRTH GRANTS	Poland			Hungary			Romania		
	1989	2000	2010	1989	2000	2010	1989	2000	2010
<i>Eligibility</i>	universal	universal	universal	Universal + linked to medical checks	Universal + linked to medical checks	Universal + linked to medical checks	From the 2nd child only	Universal	Only for the first four children, seized in July 2010 <sup>ix</sup>
<i>Amount</i>	200% family benefit, employee (with upper limit). Others – set amount.	15% average wage	1,000 PLN (50% av. wage in 2006). Double for low-income families.	6,000 HUF or 1,000 HUF <sup>x</sup>	150% min. pension (24,900 HUF)	225% min. Pension (64,125 HUF)	1,500 ROL 42.4% of average gross wage	5 times the universal child allowance, i.e. 20.5% of average gross wage	230 lei, 11.87% of average gross wage (n.a. from July 2010)
<i>Financing</i>	Social insurance	Social Insurance	Central State Budget	Central State Budget	Central State Budget	Central State Budget	Central State Budget	Local budget, through earmarked transfers from the central state budget	Central State Budget (n.a. from July 2010)
<b>TAX DEDUCTIONS FOR FAMILIES</b>	None	None	1,112.04 PLN per year per child (c. 35% of average gross wage)  All taxpayers (excluding farmers) eligible since 2007.	Tax allowance for families with 3+, in case of lone parent two children + parents with disabled child. Amount: 1,000 HUF/child/month	Tax deduction 1,700 HUF/child/month for 1 or 2 children; 2,300/child/month for 3+ children; 2,600 HUF/month/child for disabled child. <sup>xi</sup>	Tax allowance 62,500 HUF/child/month for 1 or 2 children; 206,250 HUF in case of 3+ children; Deductible from taxable income. <sup>xii</sup>	Parents with three or more children pay 30% lower taxes; All childless adults above 25 pay 10-20% higher taxes	Supplementary deductions from the taxable income for dependent household members, including children (max. 4 persons)	Supplementary deduction from the taxable income for dependent household members, including children (max 4 persons) <sup>xiii</sup> , for two children, the deduction from taxable income is 450 lei/months (i.e. 110 Euro).

	POLAND			HUNGARY			ROMANIA		
NURSERIES (CRÈCHES)	1989/90	2000/01	2009/10	1989/90	2000/01	2009/10	1989/90	2000/01	2009/10
% 0-2 age group attending <sup>xiv</sup>	4.4%	2.8%	3.9%	11.5%	10.4%	11.9%	5.7%	1.9%	2.7%
Number of public full time facilities	1,553	428	380 (2009)	1,096	532	625 (2009)	847	358	283 (2009) <sup>xv</sup>
KINDERGARTENS									
% 3-6 age group attending <sup>xvi</sup>	49%	50.1%	68%	85.7%	88.7%	88.1%	54.3% (1990)	66.5%	76.5%
Number of full time facilities	12,676	8,501	8,441	4,718 (1990)	4,643	4,366 (2010/11 school year)	12,108	10,080	11,697

Sources for Poland:

Ministry of Labor and Social Policy, [www.mpis.gov.pl](http://www.mpis.gov.pl), *Rocznik Statystyczny* GUS, 1990-2010 (Main Statistical Office – Statistical Books), Social Insurance Institution (ZUS) and the Ministry of Finance, <http://www.mf.gov.pl/>. Family allowance expenditures in Poland represent government spending for family allowance payments and nursing supplements only for the employees insured by the Social Insurance Institution (ZUS).

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 Transmonee Database. 2011. Table 7.1 and 7.2. <http://www.transmonee.org/> (last accessed: 20<sup>th</sup> September 2011.)

Sources for Romania:

Romanian National Institute of Statistics (1989, 1990, 2000, 2010): *Anuarul Statistic al Romaniei*. [Statistical Yearbook, ].  
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Note:

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- Gretkowska, Lila. Mayor, city of Żarów, Lower Silesia Province, Poland. Żarów, 14 June 2010.
- Józefiak-Materna, Anna. Deputy Director, City Social Assistance Office, municipality of Wrocław. Wrocław, 15 June

2010.

Marczuk, Bartosz. Journalist, *Gazeta Prawna*, co-author of the Polish 2007 Family Policy Program, Warsaw, 23 February 2010.

Muszalski, Wojciech. Professor, a leading expert on Polish social policy (family allowances). Warsaw, 25 February 2010.

Teresa Ogrodzińska, Director, Komeński Foundation (*Fundacja Komeńskiego*), the main NGO supporting kindergarten development in Poland. Warsaw, 4 March 2010.

Kluzik-Rostkowska, Joanna. Parliamentary Deputy (Law and Justice – PiS), former Deputy Minister of Labor and Social Policy, former Director of the Department of Women, Family and Anti-Discrimination in the ministry, main author of the Polish 2007 Family Policy Program. Warsaw, 22 October, 2009.

Kozińska, Alina. Chairwoman, Fundation of Educational Initiatives (*Fundacja Inicjatyw Oświatowych*), an NGO working to support early education in rural Poland). Warsaw, 30 March 2010.

Krupska, Joanna. Chairwoman, Large Families Association 3+ (*Rodzina 3+*), a leading NGO supporting large families in Poland. Warsaw, 23 September, 2009 and Grodzisk Mazowiecki, 17 June 2010.

Pokój, Maria. President of the “Open Door” Association (*Stowarzyszenie “Otwarte Drzwi”*), an NGOs working with low income population of the Praga-Północ district in metropolitan Warsaw, Poland. Warsaw, 16 June 2010.

Szarycz, Anna. Division Director, Health and Welfare Department, municipality of Wrocław. Wrocław, 15 June 2010.

Szumlicz Janina. Director of the Department of Family Policy, Ministry of Labor and Social Policy, Warsaw, 1 March and 16 June 2010.

### Interviews Hungary:

Adamik, Mária, sociologist, gender-expert, Eötvös University of Sciences. Budapest, 18 March, 2010.

Ferencné, Sheer, nurseries’ expert, Museum of Crèches + Early Childhood Education Center [Gyerekház] in the 8<sup>th</sup> district, Budapest, 17 March 2010.

Gábos, András, demographer, TÁRKI Institute, Budapest, 25 March 2010.

Farkas, Zsombor, researcher of the Child Poverty Center via e-mail in August 22-29, 2011.

Juhász, Borbála, Hungarian Women’s Lobby [Magyar Női Érdekvédelem Szövetsége], Budapest, 19 March 2010.

Klinger, András, demographer, Hungarian Central Statistical Office. Budapest, 12 August 2010.

Korintus, Márta, Head of International Relations, Institute of Social Policy and Labor, Budapest. (Expert in child-care services, 0-3). Budapest, 6 October 2009.

Kormosné, Debreceni Zsuzsa, Large Families Association [Nagycsaládosok Országos Szövetsége, NOE], Budapest, 23 March, 2010.

Eszter Kósa, EU- and social policy-expert, Budapest, 24 March, 2010.

Kovarik, Erzsebet, Secretary of State, Ministry of Social Affairs (interview also included Zsófia Tóth, ágoston Dulai from the Child protection department and Erika Lukács from the Pension Department), Budapest, 17 March 2010.

Krémer, Balázs, social policy expert, University of Debrecen, Budapest, 19 March 2010.

Lakner, Zoltán Lehel, social policy expert, Budapest, 22 March, 2010

Scharle, Ágota, economist, Budapest Institute, Budapest, 18 March 2010.

Tímár, János, economist, Budapest, 18 July, 2010.

### Interviews Romania:

Bădescu, Gabriel. Head of the Romanian Agency for Governmental Strategies (closed in May 2010), associate professor and Head of the Political Science Department, „Babeş-Bolyai” University Cluj, 14 October, 2009.

Bărbuț, Cornel. Chairman, Association of Catholic Families „Vladimir Ghika”, Bucharest, 7 June 2010.

Boboc, Mariana. Social worker, Department for Social Protection, Municipality of District 1, Bucharest, 9 June 2010.

Câmpan, Daniela Enricheta. President, Union of Creches from Romania, Bucharest, 7 June 2010.

Codreș, Adina. Senior officer at the National Agency for the Protection of Children, Romanian Ministry of Labor, Family and Social Protection, former director of the Saint Catherin’s Orphanage from Bucharest – District 1, Bucharest, 10 June 2010.

Drăgotoiu, Adina. Director of the Social Inclusion Department within the Romanian Ministry of Labor, Family and Social Protection. Bucharest, 9 June 2010.

Ernu, Simona. Consultant, Bernad Brunhes International, Bucharest, 8 June 2010.

Fleacă, Dănuț. Director of Department for Social Protection, Municipality of District 1, Bucharest, 10 June 2011.

Mălinoiu, Alina. Officer of the Romanian Ministry of Labor, Family and Social Protection. Bucharest, 9 June 2010.

Popa, Izabella. Officer at the National Agency for the Protection of Children, Romanian Ministry of Labor, Family and



Social Protection. Bucharest, 10 June 2011.

Popescu, Livia. Professor, Faculty of Sociology and Social Work, Babeş-Bolyai University, Cluj-Napoca, 12 October, 2009.

Preda, Marian. Head of the Presidential Commission for the Analysis of Social and Demographic Risks and Dean of the Faculty of Sociology and Social Work, University of Bucharest, Bucharest, 8 June 2010.

Roman, George. Director, “Save the children Romania”, Bucharest, 11 June 2010,

Stativa, Ecaterina. Researcher at the Institute for the Protection of Children and Families „Alfred Ruşescu”, Bucharest, 10 June 2010.

Stănculescu, Manuela. Researcher, Quality of Life Research Institute (ICCV), Bucharest, member of the Presidential Commission for the Analysis of Social and Demographic Risks, 14 October, 2009.

Stănescu, Simona. Researcher, Quality of Life Research Institute (ICCV), Bucharest, 10 June 2010.

Zamfir, Cătălin. Director of the Quality of Life Research Institute (ICCV), Bucharest, 13 October, 2009.

<sup>i</sup> In Hungary, between 1998 - 2002 family allowance was conditioned by school attendance in the case of children above 6 years old, so that half of the amount could be provided in kind in case of drop-out. From 2002 until 2009 such restrictions were stopped. In 2010, restrictions were reintroduced, with the withdrawal of the full amount of family allowance (now named as “schooling allowance” above age 6) in case of 50 days of absence from school.

<sup>ii</sup> See endnote 1 above.

<sup>iii</sup> In Romania, between 1993-2007, universal family allowance for school-aged children was conditioned by school attendance. School drop-outs were excluded. The means-tested support allowance remained conditioned by school attendance, and starting from 2010, a financial penalty applies to the means-tested support allowance in case of school absenteeism.

<sup>iv</sup> The average amount was computed for a family with two children living in the urban area, with father’s income in the lower-range (the allowance was 650 lei in 1989).

<sup>v</sup> In Romania, starting from January 2007, children below the age of two are entitled to a higher family allowance, i.e. 200 lei/month (cca. 50 Euro/month).

<sup>vi</sup> Including four optional weeks. In Poland, one week of additional paternity leave is granted, which is going to be extended to two weeks starting from 2012.

<sup>vii</sup> Full eligibility conditioned to 365 insured days within the last two years.

<sup>viii</sup> In 2010 Romania, the minimum amount of the child care benefit was 600 lei/month, i.e. equal to the minimum gross wage and 30.9% of the average gross wage. The upper limit was set at 3,400 lei/month, i.e. 5.6 gross minimum wages and 1.75 average gross wages. The law was changed by O.U.G.111/2010, applicable from January 2011.

<sup>ix</sup> In Romania, the birth grant and the trousseau for the newborn introduced 2007 (Law 482/2006), were both seized in July 2010 as part of the “austerity package” (Law 118/2010).

<sup>x</sup> Depending on the number of medical checks attended: Higher amount in case all four medical checks were attended, 1000 HUF in case of one attendance.

<sup>xi</sup> Available already before the child is born, after the 91<sup>st</sup> day of conception.

<sup>xii</sup> This means that a family with two children will have a 20,000 HUF extra income/month while a family with three children 99,000 HUF/month (appr. half of the average wage). No negative taxation is introduced thus tax allowance can only be fully utilized with families above a certain income (2.5 times the average wage with at least three children in 2011).

<sup>xiii</sup> In 2009, the personal tax deduction from the taxable income is applicable only for persons with monthly total gross income below 3,000 lei/month. The deductions are computed differently for persons with gross incomes below 1,000 lei/month, and those with incomes ranging from 1,001 lei/months and 2,999 lei/month. The amount of deduction varies according to the number of dependent family members, but only until the fourth person, than the deduction remains constant. “Dependent family member” means a relative up to the second rank, who is living in the same household as the respondent and has no income, or incomes below 250 lei/month. *Persons with gross income below 1,000 lei/month*, the income tax deduction is set as follows: 250 lei/month for single persons; 350 lei/month for one dependent family member, 450 lei/month for two dependent family members; 550 lei/month for three dependent family members; 650 lei/month for four or more dependent family member. There is no additional increase of the deduction for the fifth, sixth, etc. dependent family member. *Persons with incomes higher than 1,000 lei/month but lower than 3,000 lei/month*, the value of the deduction is computed as  $X*[1-(MGW-1,000)/2,000]$ . X = the value of the tax deduction that persons with incomes below 1,000 lei/month, with the same family situation, would be entitled to receive. MGW = Monthly gross wage. For example, the tax deduction for single persons with incomes between 1,001 lei/month and 3,000 lei/month the deduction is  $250*[1-(MGW-1,000)/2,000]$ . In case of two dependent persons in the household, the deduction is  $450*[1-(MGW-1,000)/2,000]$ . (*The Romanian Fiscal Code 2009*).

<sup>xiv</sup> Transmonee May 2011 Dataset. For Poland, nurseries and pre-school establishments; for Hungary, all types of child-care establishments; for Romania, only public child-care establishments were regarded.

<sup>xv</sup> Figures indicate the number of public crèches. In 2009, there were also four private crèches functioning in Romania.

<sup>xvi</sup> Transmonee May 2011 dataset for data on 2000/01 and 2009/10. For Hungary, enrolment in pre-primary education at the age of 5 is mandatory.