

# Gazing at Welfare, Gender and Agency in Post-socialist Countries



Gazing at Welfare, Gender and Agency  
in Post-socialist Countries

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P U B L I S H I N G

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## NOTE ON TRANSLITERATION

In this book, the Library of Congress transliteration system of the Russian language is used. Yet, there are exceptions to this system when the names of well-known people and places are typically spelled differently in English-language publications: for example, El'tsin becomes *Yeltsin* and *Yalta* as opposed to *Ialta*. In addition, some Russian typical first names are transliterated according to this principle: for example *Iulia* becomes *Yulia* and *Iurii* becomes *Yuri*.



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This book is a result of the transnational umbrella research project *Welfare, Gender and Agency in Russia in the 2000s (WGA)*, carried out at the Aleksanteri Institute, University of Helsinki, in 2008–2012. Our aim, in the mentioned project as well as in this volume, is to analyze welfare and political democratization on the one hand as structures and processes and on the other hand as cultural meanings and through agency, which all are strongly gendered. We give special attention to research methodologies, particularly on doing research through fieldwork and through micro-level understanding of our topics. However, we emphasize combining these micro worlds into their macro-level foundations. Moreover, we aim at promoting and diversifying dialogues in order to explore and analyze the evolving welfare regimes across time, in the past and today, and space, in Western and post-socialist countries. For these dialogues, this volume is a step forward. It aims at building bridges between various research teams, disciplines, frameworks and methodologies.

In order to bring together scholars, interested in intersecting issues of welfare and gender, we organized an annual Aleksanteri Conference in 2008. The participants of the conference—many of whom are authors of this volume—gave a valuable contribution to this endeavour. Warmest thanks for all the participants as well as to the contributors of this volume! We are also obliged to the members of the conference committee individually and as a whole—especially we want to thank MA Kaarina Aitamurto, Dr. Simo Mannila, Dr. Jouko Nikula and Dr. Suvi Salmenniemi for their contribution to the work of the committee—who also served as first referees of the texts proposed for this publication. According to their valuable evaluation, we were able to proceed to the second round, in which the anonymous referees had a major role. These referees deserve our thanks as well. We also want to thank the Aleksanteri Institute and its Director, Professor Markku Kivinen who has always been very supportive for our WGA project and related initiatives and activities. Particularly, we appreciate BA Heini Puurunen, who has done marvellous work, first as a conference secretary and then in technical editing and creating the layout of this volume. We would not be able to be here, to address these forewords without her continuous efforts in assisting us.

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Helsinki, September 2010,

Maija Jäppinen, Meri Kulmala and Aino Saarinen



CHAPTER ONE

INTRODUCTION:  
INTERSECTIONS OF WELFARE, GENDER,  
AND AGENCY

MAIJA JÄPPINEN, MERI KULMALA  
AND AINO SAARINEN

Since the collapse of the Soviet Union and socialist regimes in Eastern Europe, the welfare structures of the post-socialist states have experienced large and rapid changes and constant reformulation. During these transitions, the gaps in citizens' welfare deepened both externally, in relation to Western European countries, and internally, between different groups of the population inside one post-communist country.<sup>1</sup> Polemically, one could argue that in the socialist regime, the social rights were prioritized, while the political rights were neglected; whereas in the transition period, the main problems have concerned the lack of social rights and welfare. Will the new liberties and freedom be combined, in the longer run, with increasing affluence and welfare to all population? Will the welfare institutions become more receptive to citizens' needs and to participation from below? What will the role of the state be in the future? Gender provides a relevant prism in these trends and processes: it inextricably relates to welfare and agency and to practices of bearing the responsibility of everyday life.

Twenty years have passed and it is high time to evaluate past and current developments and make comparisons in time and space—between the early 1990s and late 2000s and between post-socialist and transitional countries. Although the “Eastern block” was never homogenous in relation

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<sup>1</sup> For example, the UNDP welfare indexes scored the Soviet Union as one of the countries of high human development, whereas in 1995 Russia had already dropped to the level of the developing countries. The GNP was cut in half and poverty increased tenfold.

to social issues, during the last twenty years these differences have reached a new level. Instead of one uniform Eastern European block, many new alliances have emerged. Many countries do not even associate themselves with “Eastern Europe” anymore. Three Baltic States and seven countries from Central and South-Eastern Europe have joined the European Union in the mid-2000s. They have again become a part of the larger multinational dynamics; this time, they must follow “European” values, policies and programmes on welfare and democracy. Some other countries, for instance Georgia, are on their new paths, in a sense that they seek economic, political and military memberships, which would take them as far as possible from the former power constellations. Some others have decided to stay independent and make up their futures and fates on their own—Russia in the first place, but also, for instance, Belarus and Kazakhstan.

### **Welfare Regimes in Transition**

When looking at the situation in these newly formed regions, one can claim that inequalities have dramatically increased. For instance in Russia, a third of the population lives in poverty, most affecting the countryside and families with children and elder people, in particular. This poverty is also gendered: the majority of the poor are single mothers and pensioners who are mostly old women living alone. Also, the institutional reforms of the welfare structures have not proceeded in the expected way since the collapse of the former regime; Russian welfare institutions remain rather weak and of low quality. Importantly, Russian women, as well as those in other former socialist countries, have a remarkable role in everyday practices and innovations in search of better well-being.

The socialist welfare regime was statist with many corporatist and paternalist elements. The state was responsible for providing welfare for its citizens; the socialist social contract was based on the obligation of the state to provide care for its citizens, in collaboration with publicly owned enterprises. However, in practice, the lack of sufficient well-being and welfare services of poor quality were features of everyday life. Women carried the main responsibility of organizing everyday well-being through diverse ways and networks in the private sphere. The gender contract was based on an idea of a working mother—one who was a full-time member in the labour force, but at the same time carried most of the daily domestic and care work.

At present, in Russia in particular—after the somewhat chaotic privatization and decentralization of the welfare responsibilities during the Yeltsin period—the state has reclaimed more responsibilities in the field of

welfare. In the 2000s, in the Putin period, the macro economy started to grow due to higher energy prices. The state has invested a part of these incomes in welfare. As Linda Cook shows in her chapter in this volume, since the autumn of 2005, one witnesses a shift from a liberal logic of state minimalism to a more interventionist and paternalist state. Cook speaks about the ideas of statism and pronatalism in the centre of the recent federal reforms. Thus, as absurd as it sounds, the Russian demographic crisis—a crisis rooted in the unhealthy ways of life of Russian men—have led to resolutions that put onto shoulders of Russian women the responsibility of giving more births.

The development paths and resolutions of the countries in transition have been different from each other, ranging from radical liberalization to more gradual processes that preserve elements from the old regimes. In this volume, our aim is to bring together examples and cases from various post-socialist countries. The majority of the chapters are about post-Soviet Russia, but they also concern changes in the Czech Republic, the Former Yugoslavia, Romania and Moldova, which, in fact, represent different new alliances of the 2000s. One of our main objectives is to recognize a variety of solutions within the region, and thus leave space for comparisons between the post-socialist states. In our opinion, it is important to consider these countries not as a homogenous regime, but to see also the differences within and across the countries, both in the past and present, not forgetting their historical roots before the socialist period. As we know, also in Western countries, different welfare regimes exist. This complexity of different values, institutions and practices calls for examining those countries from the viewpoint of the different regimes. These welfare models are the focus of this book—the chapters very much in conversation of one another look at the models from many, perhaps even contradictory, angles.

Many of the chapters look at these questions from the liberal tradition, but, for instance Meri Kulmala and Rebecca Kay ask questions that are essentially linked to the debates on other kinds of regimes: can we always separate the state and non-state actors in contemporary Russia? Kulmala's chapter imports the Nordic, often called Scandinavian, model to these discussions. We prefer to speak about the Nordic model in order to include all five Nordic countries. In these countries, the strong state is not necessarily an opponent to civil society and women's empowerment; instead, one can even speak about the so-called state-feminism. This term refers to women's empowerment through the state: women are well represented even in higher political bodies and can influence both from below and above. In our opinion, even in Russia, there might be prospects

for progress through collaboration of civic actors and the state at its local and regional levels. In the situation when women are almost absent in higher-level politics, it is particularly important to recognize the multilevel governmental systems as a whole in order to find new spaces and avenues for agency from below.

All in all, new kinds of regimes are emerging throughout the post-socialist region. The debates, from the early 1990s, on the Western models—liberal, conservative/corporatist and social-democratic regimes—were very much revolving around the role and responsibilities of the state. These models offer just one starting point for comparisons across time and place, in all their varieties. Importantly, new approaches are needed for the 2000s, as well as more empirical and theoretical evaluations of the former socialist regimes.

It is necessary to stress that most of the concrete welfare work—formally and informally—is done by women. This fact brings gender, in many ways, into the focus of this book; also the former working mother contract must be revisited. In addition to focusing on women's agency and on vulnerable groups in need of better welfare, we want to emphasize the regional variations not only between the post-socialist regions, but also inside these countries. In the Russian case, despite the fact that the general principles of welfare policies are the responsibility of the federal state, the implementation of practical welfare services and solutions lie on the level of local communities. Geographically, Kay and Kulmala bring the understudied level of Russian small towns and countrysides into this picture. Kulmala, in particular, emphasizes that the local welfare solutions and innovations are possible if only the local key actors are willing to contribute to their development. As a contrast, the book includes studies on urban contexts, at both the metropolitan and suburban scale. Julie Brown and Nina Rusinova, for instance, examine informal health care practices in the context of St. Petersburg, while Jane Gary Harris focuses on pensioners in one district of the city. These variations in scale are also of interest in terms of the debates on the welfare regimes.

Moreover, we have to look at the ongoing fundamental changes in the new EU member states. Regarding social rights, Mojca Pajnik and Veronika Bajt as well as Majda Hrženjak make reflections on the present regime in Slovenia. They point to the increase of informal and illegal domestic work carried out by migrant care workers. The formal EU policies and regulations do not seem to be effective in respect to migrants. On the contrary, Europeanization and globalization have led to a shift of jobs into grey zones, which can be interpreted as a systemic change.



## **Methodological Challenges: the Significance of Case Studies**

From another angle, one of the aims of the book is to discuss the macro-level welfare structures and policies in the post-socialist countries. The volume begins with Cook's broad-based macro-level synthesis of the policy developments, affecting the welfare regime in the Russian context. However, we want to bring a micro-level view and an emphasis on the agency into discussion with this macro-level framework. Thus, methodologically we emphasize the importance of combining a micro-level based understanding of welfare with the macro-level processes. The volume brings together studies concerning the macro-level development as well as micro-perspectives on welfare from the viewpoints of various target groups of the welfare services as well as from the viewpoint of the agents in engaged in providing the welfare.

The authors of the volume approach post-socialist welfare from several methodological viewpoints as well as from different disciplines within social and political sciences. As noted, they include micro and macro perspectives, and their combinations, on welfare. We do not want to give preference to any of them. Instead, we want to emphasize the necessity of linking the micro worlds to the macro level processes, and vice versa; micro and macro should not be seen as opposing each other, but as complementary and intertwined. This way, our picture of welfare in post-socialist context becomes more complete. Also, different sets and types of materials used by the contributors of this volume serve to incorporate micro and macro perspectives. Multipositionality is common for several chapters of this volume. It consists of making a variety of comparisons between the regimes; moving diachronically between different periods and synchronically between macro and micro levels; approaching the developments through fieldwork and evaluating them, both as insiders and outsiders, and in collaboration with local scholars. Numerous chapters are based on extensive fieldwork and use rich ethnographic datasets. In particular, Kate Thomson's chapter on researching disability in contemporary Russia puts an emphasis on the methodological considerations about conducting welfare research at the micro level. She develops a micro-level based understanding of welfare issues in a post-socialist context and explores conceptual, theoretical and methodological problems that are faced when researching welfare at the micro level, in particular. Also Kay prefers an anthropological conceptualizing of social security, developed on the basis of ethnographic research, instead of conventional (i.e. numeral) and, thus, more narrow in scope understandings of it.

Possibilities for field research are contingent on access to the field. Certainly, observation—not to speak of participant observation—would not be possible in the Kremlin, which is one of the main focuses of many Western (male) scholars. In contrast, our interest is outside elite politics, in the everyday life and people operating at the grassroots. This kind of interest makes it easier to enter the field. During the socialist times, the field was pretty much closed; today the situation is different and favourable to ethnographic approaches and methodologies. Ordinary women and men, children and old people are easily "accessible", which is evidenced by the field studies of this volume. For example, Harris' study on the informal care networks among the elderly in St. Petersburg is carried out by spending time in everyday settings with the elderly—chatting in kitchens or on outdoor benches. Numerous studies of this volume also prove that the social and health care institutions are accessible for social scientists' fieldwork: examples of this are Rosie Read's research on hospital volunteering in Czech Republic, Maija Jäppinen's study on domestic violence frameworks in a municipal women's crisis centre in Udmurt Republic as well as for instance Kay's and Thomson's studies within municipal social service centres. Holding on our mission to combine micro- and macro-level analysis, we believe that addressing critically the gender order, established politics, and questions of social justice requires macro-level analyses, as well.

### **Focusing on Welfare Cases, Agency and Gender**

We have paid attention to the fact that most often the scholars relying on fieldwork and those research participants who are involved in welfare provision at the grassroots are women. Thus, both the focus on welfare and methodologies brings gender to the forefront of this book. As noted, most welfare work is done by women—whether officially or informally. For instance, in Russia, as all over the world, the majority of the public sector workers are women. Unsurprisingly, their amount gets higher in the welfare institutions of the public sector. This female predomination in the public welfare sector is pointed out in many of the chapters of this volume. In addition to this official welfare work, women also carry responsibility for the informal, and often hidden, welfare work in the private sphere and in civil society. Brown and Rusinova look at both, official and hidden, health care work as a gendered practice. Similarly, Harris discusses the elder care, carried out within the private sphere by (female) family members and neighbors, and contrasts it with the official social services

for pensioners. Social and health care related activities in the sphere of civil society are discussed by Eva Maria Hinterhuber and Read, for instance.

In our opinion, theorizing the evolving welfare models has, thus far, left the issue of gender: very little has been discussed about the preponderance of women in this field or about men as welfare actors and their responsibility in the private sphere. Furthermore, the feminist debates of the 1990s on the crisis of masculinity—which included problems such as low life expectancy, widespread alcoholism and marginalized role of men in households—have not been combined with problems of welfare. Thus, in this book, special attention is given to the gendered dimensions of welfare—yet, with a particular focus on the role of women.

We also want to stress that alongside the economic-social problems in welfare, the bodily-sexual questions and issues of women's integrity must be taken seriously in theorizing welfare and social justice. This brings welfare under a broader analysis than is traditionally applied: it includes not only the socio-economic indicators of welfare, but pays attention also to other issues, such as reproductive health and gender violence. Jackie Kirkham, for instance, focuses on reproductive and sexual health in Romania and Moldova. She investigates the discourses of sexual and reproductive rights and the local understandings of these issues. In addition to Kirkham, the previously silent issue of gender violence is addressed in the chapters by Janet Elise Johnson, Jäppinen and Kulmala. Johnson, in her chapter, draws a picture of the transnational influences on the women's crisis centre movement in Russia, while Jäppinen investigates the frameworks of domestic violence in one women's crisis centre. Kulmala, for her part, looks at the collaboration of public and voluntary sectors in combating gender violence locally.

To return to the methodologies: in many chapters, welfare is addressed through the case studies. Some of these cases address one particular social problem, for instance domestic violence as in several chapters of this volume, while some chapters concern a certain group of people, as for instance Elena Iarskaia-Smirnova's chapter on women in wheelchairs. Many chapters are based on case studies in one particular institutional setting, such as social services centres or civil society organizations, for which Hinterhuber's study on those organizations in the social sphere serves an example. Moreover, these different types of case studies are most often conducted and in one or several geographical locations. For example Brown and Rusinova focus on the unacknowledged labour of family and friends in health care practices and care provided by physicians outside the formal system in St. Petersburg, employing both interview and survey data. Harris' study on the elderly is localized in one of the districts

of the city of St. Petersburg. However, many of the cases explore other, more peripheral, regions of Russia: for instance, Jäppinen's study on domestic violence is located in Izhevsk, the capital of Udmurt Republic, while Kay explores how social security is produced and experienced in Burla village in Altai Krai. Elena Iarskaia-Smirnova's analysis of the life experiences of women with disabilities is based on interviews, conducted in Samara, in a provincial centre in the Southern Volga region. Also Thomson draws her methodological discussion from the case studies in two different regional capitals of Russia. Hinterhuber, for her part, builds her analysis on civil society organizations in five different Russian cities and regions. Therefore, the volume undoubtedly gives us a more complex, and thus perhaps at least a slightly more complete picture on variety of welfare developments and solutions inside Russia. Furthermore, as emphasized, the focus is not only Russia, but Pajnik and Bajt, Hrženjak, Kirkham and Read broaden our views on other post-socialist countries.

So, in many ways, the book gives a central role to women's agency by providing case studies that investigate the welfare agents or organizations or their target groups or issues. Harris looks at the marginalized elder mobilizing for self-help. Iarskaia-Smirnova gives a voice to Russian women with disabilities by exploring the experiences of a previously silent and neglected group. Kulmala shows that through the efforts of a transnational project that brought together Finnish and Karelian partners, it was possible to gain access to the people with mental disabilities, previously ignored under the local public service structure. Brown and Rusinova, for their part, reveal the gender differences in hidden health care practices in Russia.

Some of the case studies in this book make explicit the emphasis on women's agency and organized activism within civil society. For example, Hinterhuber focuses on women's engagement in social-sector NGOs and shows how women's civic engagement led to the personal, juridical, political, social and cultural empowerment of the women in her study. Read explores the female volunteers and the meanings of their voluntary work in the Czech hospitals. She concentrates on the gendered dimensions of volunteering and the ways in which female volunteers are viewed as one of the requisites of caring labour. However, this voluntary activism promotes the self-realization and self-discovery of these women. Kulmala, for her part, investigates the interrelations of civil society organizations and public sector in their attempts to solve local social problems at the municipal level. Illustrating the interaction of the public and voluntary sectors through an example of a municipal social service centre, she shows that the relationship between the state and non-state actors, which is often

presented in scholarly literature as a sharp divide, is sometimes much more complex. In addition, she challenges the division of civil society organizations into separate policy-advocacy and service-oriented organizations and argues that one social organization can exhibit both of these functions. Often, crisis centres for women, for instance, have similar dual purposes: to provide services and help for women and to promote societal and political change (Jäppinen, Johnson, in this volume).

## **Transnational Dynamics of Collaboration**

Case studies and ethnographic methodologies bring us also to the transnational level, to the new kinds of East-West divisions and relationships. Since the early 1990s, not only Western field researchers but also various development workers have invaded the “East” in order to promote the transition toward the market economy, democracy, and rule of law. Case study methods are good tools in following up and evaluating these developments and changes. Also, the periodization of the transition is most necessary. In the first years of transition, during economic and social crisis, Western aid can be characterized as a short-term and one-way emergency relief—later, as a long-term institutional development. The latter should have been translated into a two-way dialogue and into an exploration of the local conditions, needs and wishes of the “recipients”. Today, both scholars and practitioners are interested in evaluating the effects of these transactions on ordinary people’s lives and on the institutional and normative changes at the macro level. In general, in the West, there is much pessimism and disillusioned talk on the results of these aid processes.

Many of the volume’s chapters discuss these East-West processes. Most of the Western aid has been allocated to the economic sector. However, gender equality was on the agenda as well—both as “women-centred” problems linked to the family life, and as women’s own agency and empowerment to promote feminism. The latter is of special interest in order to reveal gendered nature of welfare and institutions and in order to include bodily-sexual questions and the issue of women’s integrity, in all their complexity. For example gender violence, including not only violence in a close relationship, but also lack of reproductive rights and exposure to prostitution, has been an important issue in the UN declarations as well as in the global mobilization to protect women’s rights.

Johnson analyzes Western democracy assistance for Russian women’s groups in the framework of gender violence at the national level. She

argues that Russia's progress concerning domestic violence resulted, at least partly, from an infusion of foreign funds through transnational collaborations by global and local women's activists. This has led to a remarkable crisis centre movement in Russia. In this sense, the movement can be seen as a positive example on how transnational collaborations can work for in the best interests of women. Kirkham, for her part, moves at the local levels in Romania and Moldova and brings in grassroots actors promoting women's sexual and reproductive health. She shows how the repressive pronatalist policies deriving from the socialist times have now been challenged by NGOs and other non-state activities, influenced by Western debates. The Western discourses and local understandings are, however, not in any perfect harmony. Conservative attitudes and religion play a role as well.

Moreover, one should not forget that the institutionalization process of the NGO-run crisis centres, which already started in the 1990s with the help of foreign funds, has been replaced by the struggles for survival of those centres in many places in recent years. The Western and multinational financing agencies have diverted their course and moved to new "emergency areas" and issues. Nonetheless, it is clear that the issue of gender violence has become more prominent—all over the former socialist region. For instance in Russia, thanks to these local case studies, we can register local "success stories". On the Finnish border, in Russian Karelia, Kulmala finds encouraging examples of Finnish-funded projects for the development of civil society in general, and for the dialogue between the authorities and civil society, in particular. An issue worthy of mentioning is also the emergence of the Russian public crisis centres. Jäppinen looks these developments critically in her case study, addressing the dynamics and changes in one municipal centre. The number of the public centres has been increasing since the mid-2000s, during the second Putin period. Interestingly, this occurred at the same time as the so-called NGO legislation tightened the control of civic organizations and their collaboration across the borders, as Johnson points out. Perhaps, this is new evidence of the "statist turn" suggested by Cook. How beneficial this turn is for women, however, must be seriously analyzed, since the federal-level legislative reforms are still pending. On the other hand, at least in the new EU member countries, the reforms have led to situations that are "politically correct": the systems are formally in accordance with the EU regulations, but there is so far very little evidence on how the reforms work in practice.

From a transnational angle, worth a special remark is the contribution of Pajnik and Bajt. They make a new move by turning the attention to

South-Eastern Europe and, moreover, to the West, by investigating different East-West interactions in migrants' experiences in Slovenia, which joined the EU in 2004. The heritage from the Yugoslavian period, the newly acquired independence and the new alliance are all intertwined during this most recent period. The crisis of the welfare state is used to erode social citizenship. This process targets the weakest groups—the migrants, in particular, who are under close watch when it comes to border crossings and entry into the labour market. All in all, the question is about new borders, about people on the move—about their own agency, experiences, longings and belongings.

Also Hrženjak crosses the former East-West (EU) border and takes up a most burning issue of social justice. She challenges the West in a very special way; she explores migration from East to West from the angle of gender and welfare. Intersections of migration, gender and welfare are on today's feminist agendas alongside with a question of feminization of migration. Many Eastern women, including those from affluent Slovenia, have left their own children and elders behind. They have come to work in the homes of the Western women, especially in Central-Southern Europe, to solve demographic and welfare-related problems of the Western side of these borders. There is, indeed, good reason to ask who cleans and cares in the East, if Easterners do it in the West. In other words, how do these former Eastern countries solve their own demographic and caring crisis in this new situation. Is this situation just a trend or a more permanent phenomenon?

## **Between East and West—Epistemological Challenges**

This book is a result of the transnational collaboration of scholars interested in welfare and gender related issues in post-Soviet countries as convened by the umbrella project "Welfare, Gender, and Agency in Russia in the 2000s" (WGA), a research project of a group of Finnish, Russian and U.S. scholars exploring welfare in contemporary Russia. It is high time to bring together research on these intersecting issues, which is the objective of this book. By including scholars from "East" and "West", we aim to provide diverse views on the past, present and future and, thus, to promote multipositionality in this sense. For decades, the Eastern bloc was marked as "the other". Analyses, labelled as "sovietology", were based on deficient information and datasets, on biased evaluation and on minimalistic dialogue. Since the collapse of socialism, the previously closed regions became targets of the phenomenon that has been called "development invasion" and "democracy assistance"—questions also discussed in this

volume. One can justifiably ask, if “sovietology” has now been replaced by “transitology”? In this latter discourse, the “East” can, again, become constructed as something different, lagging behind, and as a threat that needs to be confronted and controlled. This bias also concerns feminists, including ourselves, on their missions to their “backward” socialist and post-socialist sisters. To transform mere criticism to self-criticism—especially when it comes to transnational collaboration—becomes unavoidable and inevitable: polemically said, one cannot teach democratization from below by the actions directed from outside and above.

Almost two decades have passed from the disintegration of the socialist regimes in Eastern Europe. The East-West divides are erupting; these divides, such as they existed during the Cold War and during the time of the capitalist-socialist confrontation, have become more complex and vague. One can also ask if they are relevant anymore. In the mid-2000s, when ten former socialist countries have joined the EU, transition has become an outdated term for them; they no longer identify themselves as “transient” in its post-socialist meaning. National identities are also changing. So are the interpretations of feminism. In our opinion, the questions of welfare, gender and agency—and, furthermore, their intersections—should be high on the research and political agendas. There is also room and, in fact, a need even for post-colonial approaches and criticism. Epistemologically, this calls for deconstruction of the East-West division and of the prevailing fixed “area studies”. To do this, we need continuous dialogue, diverse and reciprocal interactions—including conferences, publications and long-term research collaborations. Moreover, we need to continue discussing welfare, social justice, gender and agency from below, in the light of political democracy and of inclusion of each citizen and resident throughout Europe. We, for our own part, believe that democracy and welfare of the majority of the people, and the vulnerable groups in particular, are interdependent in nature.



**PART I:**

**WELFARE REGIMES IN TRANSITION**

## CHAPTER TWO

# RUSSIA'S WELFARE REGIME: THE SHIFT TOWARD STATISM

LINDA J. COOK

Since 2005, Russia's welfare regime has undergone a major shift, from the liberalizing direction of the Yeltsin years and first Putin administration toward a statist model. Earlier reforms decentralized and liberalized Russia's welfare regime, limiting the role of the state, particularly of the federal centre. Reforms devolved social service provision to regions and municipalities, introduced market mechanisms in health care and education, made labour markets more flexible, and eliminated subsidies and entitlements. The Gref Plan, the centrepiece of reform policy in Putin's first term, encapsulated the theory and practice of a subsidiary welfare model that would in its pure form limit the role of the state to the regulation of social services and insurance markets, and direct provision of transfer payments and social services for the poor. Putin's last major liberalizing initiative, the "monetization" of social benefits in early 2005, was designed to replace a massive system of untargeted subsidies and in-kind provision that had been inherited from the Soviet period. While monetization proved controversial, provoked protests, and has not been fully implemented, the government continued to support principles of welfare state liberalization, rationalization, and privatization. (Cook 2007.)

Since the autumn of 2005, these principles have been supplanted by a shift back toward statist welfare policies, with a pronatalist agenda at their core. Russia's central government began to play a much more activist and interventionist role in social welfare, mounting the Priority National Projects in health, education and housing, as well as ambitious demographic policies. These policies are directed toward halting a decline in population that the government sees as threatening Russia's national security and economic development. New social sector programs have partially recentralized the welfare state and increased federal responsibility and financing. In a reversal of recent moves toward rationalizing reforms and

need-based provision, they have introduced new untargeted subsidies, entitlements and privileges for selected population groups. The National Priority Projects and demographic policies have entailed new interventions in employment, housing, and health care markets on behalf of the state's demographic goals. Their primary purpose is to increase birth rate; programs and benefits are directed disproportionately toward women, young children, and families.

My chapter examines this policy shift by contrasting the direction of welfare state change during the 1990s, especially the first Putin administration (1999–2003), with those of Putin's second term.<sup>1</sup> It focuses on the priority projects and demographic policies, examining their programmatic features, underlying principles, and political sources. To preview, the initiative for these policies appears to lie mainly in the executive branch of the government, and to form part of the larger project of rebuilding a stronger, more assertive Russian state. The projects are in important respects modelled on old Soviet practices, though they also have much in common with work-family reconciliation policies pursued by OECD countries in an effort to raise fertility rates. The policy shift coincided with economic growth that provides opportunities for welfare state expansion, as well as increasing authoritarianism that limits societal interest articulation and demand-making. In contrast with the earlier Putin-era reforms, university- and research institute -based experts seem to have been marginalized in the formulation of these more statist policies. Rather, the policies are framed in a nationalistic and paternalistic rhetoric that has increasingly come to characterize Russia's social policy debates. (Chandler 2008.)

### **Liberalization of Russia's Welfare Regime: 1991–2003**

From 1991 the Russian Federation went through three periods of welfare state reform, each with a distinct set of institutional and political configurations: the immediate post-transition period of executive hegemony under Yeltsin; the period of incipient democratization in the mid-late 1990s; and the period of democratic decay and semi-authoritarianism under Putin from 1999. The first period produced radical but poor-quality liberalization. During the second, conflict between the

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<sup>1</sup> For comments on various stages of the draft of this chapter, I would like to thank Maija Jäppinen, Aino Saarinen, an anonymous reviewer, and especially Meri Kulmala. While the comments of each improved the chapter, I alone am responsible for its contents.

executive on the one hand, and the left-dominated Duma and statist welfare bureaucracies on the other, produced a disabling deadlock over welfare state change. During the third period, which is discussed in more detail below, political shifts enabled liberalization to proceed even as economic conditions improved and fiscal pressures eased. Popular interests mattered in the second period, when societal groups gained some representation in Russian politics, but broader societal interests were largely closed out in the first period, and again under Putin's semi-authoritarian presidency. (Cook and Nechemias 2009.)

It is important to note here that the liberal welfare state constitutes only one of the available Western models, in fact the most restricted and minimalist of these models. Esping-Andersen's classic typology of European welfare states distinguishes three variants: besides the liberal, also conservative-corporatist and universalist-social democratic models. In conservative-corporatist welfare states, social rights attach to and preserve class stratification and the traditional family, loyalty and service to the state are rewarded through privileged benefits for civil servants, and the welfare state plays a protective but virtually no redistributive role. In the universalist variant, by contrast, the state redistributes to promote equality and is inclusive, guaranteeing society a broad range of social rights. It is by far the most effective in providing popular welfare and diluting differentials that are generated by markets. The liberal model restricts the government's role mainly to providing a residual safety net for the poor, and relies on privatized provision and social security markets. (Esping-Andersen 1990.) Under the influence of international financial institutions and other promoters of liberal ideology, the post-communist Russian government largely eschewed both conservative and universalist models, and pursued with varying success policies directed toward liberalization.

From the beginning of the 1990s, the post-communist Russian government pursued a welfare reform strategy that was based on liberalizing principles of decentralization, privatization, marketization, and restriction of the state's role. In place of the inherited, state-dominated system of social provision, various legislative initiatives introduced private medical practices, competition, and medical insurance markets. Private alternatives were introduced in Russia's education and pension systems. The Yeltsin administration sought to eliminate deep inherited state subsidies for housing, to move toward full cost-recovery rents, and to create a predominantly private housing market. Multiple efforts were made to eliminate the thousands of special benefits, privileges, and subsidies to which various categories of Russian citizens were entitled, and to replace

them with a streamlined, rationalized system of means-tested social assistance targeted on the poor.

These reforms were driven by a combination of severe economic decline that led to reduced government revenues, and the liberal market ideology that dominated the overall economic reform strategy during these years. Specific interventions by the World Bank and other international actors also promoted liberal welfare state models. During the 1990s welfare reforms were pursued haltingly and inconsistently. This happened in part because of the internal weaknesses of the Yeltsin administrations, in part because of opposition from the Communist and other parties in the Duma and resistance from statist-bureaucratic welfare stakeholders, particularly from social sector ministries that had a vested interest in the inherited system. *De facto* welfare provision during the mid-1990s more often entailed the spontaneous collapse of social services, social sector wage and transfer payment arrears, and unplanned and unmediated degradation of social sectors, rather than planned changes. Nevertheless, the government's overall approach to welfare pushed in the direction of structural reforms that would diminish the state's role, and transfer much of the responsibility for social provision to individuals and families. The administration's declared goal was to limit the state's responsibility to regulating social security markets and providing means-tested assistance for the poor. Both practically and normatively, the goal was to establish a liberal welfare regime.

### **The Gref Program for Welfare State Reform**

With the transition to the Putin presidency in 1999 and the beginning of economic recovery, the liberal direction of welfare policy change was sustained, formulated more carefully and comprehensively, and pursued more consistently and successfully. The new administration's welfare reform agenda was laid out in a set of major policy planning documents generated by German Gref's Centre for Strategic Planning, and approved by the government in spring 2000. The Centre produced a comprehensive plan to move Russia toward a social model in which markets and private actors would play the major role and the state a limited one. According to the government program based on the plan:

Policy [--] supposes a transition to a model [--] which redistributes social expenditures to the most vulnerable groups and at the same time reduces social transfers to secure families. Under this approach citizens who have independent sources for the financing of social needs, themselves [--] should pay practically all of the costs for housing and utilities, and part of

the expenditures for medical services, education, pension insurance [--] A significant part of social services for this category of citizens should be provided mainly on a competitive basis through non-state enterprises. At the same time, the state should not decrease efforts to provide social help and a restricted list of free services in health and education for that part of the population which, without the state's help, would not have access to basic social goods. (Programma Pravitel'stva Rossii 2000.)

The means-tested poor, those with incomes below subsistence, would receive monetary transfers and a separate set of basic social services, much as in the US welfare system that provides the prototype for the liberal model. The Russian government would once again attempt to phase out most subsidies and categorical privileges, and to expand market and public-private cofinancing mechanisms. It would seek to create various types of non-state commercial and non-commercial provision of social services that promised to provide competition and choice. The Plan was based on principles of subsidiarity, which hold that the state should not do what individuals and markets could do independently. The major provisions of the Gref Program are laid out in Table 1. It portended changes in programmatic structures across all areas of the welfare state. Housing would be provided and financed through market mechanisms. Access to health services would be segmented by income group. Pension provision would be moved from solidaristic principles toward individual investment accounts. Labour markets would be deregulated, and restrictive social protections reduced. Large new costs, risks, choices, possibilities, and responsibilities would be transferred to society.

The Gref team consulted broadly with the expert community in its policy formulation process, attempting to systematize the accumulated knowledge of the preceding years. According to one informant,

Four people created the Gref Program, but they worked for several months and discussed it with many people. They sent letters to many research institutes asking for materials—executive summaries—of what researchers proposed for the national economy and for social programs—most institutes got these letters. (Social Policy Expert, MERIT 2000.)

The final plan was, however, written by a narrow group from or closely connected to the executive who continued to control the policy agenda in the social sphere. This was a somewhat inclusive and consultative, but in the end narrowly-dominated policy process.