

## **DEFAMILISATION IN CENTRAL AND EASTERN EUROPE: A CLUSTER ANALYSIS**

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### **Abstract**

The gender critique of the welfare states typologies, especially Esping-Andersen's three ideal-type welfare states, has generated a new perspectives on comparative analyses of social policy. The female autonomy and economic independence from the family became an important issue in welfare state regimes debate.

The emerging Central and Eastern European welfare systems after the collapse of communism have generated a variety of interpretations about the nature of the new regimes, but these approaches pay little attention to women's relationships with the welfare state. The primary aim of the article is to assess the extent to which defamilisation creates distinct welfare regimes across post-communist countries. Using cluster analysis we find that there are no clear differences in defamilisation between Western European countries and post-communist countries. Furthermore, the findings indicate that the latter countries are different from one another in terms of defamilisation and belong to two distinct clusters.

**Key words:** defamilisation, welfare state regimes, cluster analysis, comparative social policy

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### **Introduction**

Listner (1997, p. 173) defined defamilisation as “the degree to which individual adults can uphold a socially acceptable standard of living, independently of family relationships, either through paid work or through social security provisions.” This definition is definitely followed in research concerning the degree to which the welfare state supports autonomy and financial independence of women – the research which can also be treated as an attempt at welfare state modelling (Bambra 2004, 2007). A completely different concept of defamilisation functions in academic discourse, for example in papers by Esping-Andersen (1999) and Korpi (2000). In the view of these authors, defamilisation refers more to the degree to which the welfare state supports a family. In other words, it concerns the extent

to which the material standing of a family (or more broadly, its welfare) depends on its position on the labour market. Thus, the former definition speaks about freedom from the family while the latter concerns the freedom of the family (Bambra 2007, p. 204).

In this article, defamilisation is treated as a concept referring to the independence of a woman from the family (so as in the first definition). An attempt is made to answer the question whether, from the perspective of defamilisation, Central and Eastern European countries pursue their own model (models) of the welfare state or whether they function within the existing typology characteristic of highly developed countries. The subject matter and objective of research defined in this way go beyond the previous studies on welfare state modelling based on the concept of defamilisation and they incorporate former socialist bloc countries into the analysis. Authors propose to look at the issue of welfare state regimes in these countries not only in the space outlined by the most popular typology advocated by Esping-Andersen (1990) but also in the context of relations between the economic position of women and the model of social policy – the issue which is virtually absent from deliberations on welfare state modelling in post-communist countries.

### **Classifying welfare states: Data and methods**

After Bambra (2007), the paper uses three indicators which describe the degree of defamilisation understood as the range of autonomy and economic independence of women: relative female economic activity rate (expressed as a difference in percentage points between the economic activity rate of men and women at the age of 15–64), maternity leave compensation and compensated maternity leave duration (table 1).

Eighteen countries were analysed: Australia, Bulgaria, Czech Republic, Estonia, France, Germany, Greece, Hungary, Latvia, Lithuania, Norway, Poland, Romania, Slovakia, Slovenia, Spain, Sweden, United States. In order to determine the distinctness of a welfare state model (or the lack of its distinctness) in individual Central and Eastern European countries, seen from the perspective of defamilisation, selected highly developed countries were proposed as reference points. These countries undoubtedly belong to separate regimes, according to the best known classification of welfare states proposed by Esping-Andersen (1990), and extended (with a Mediterranean model) by Leibfreid (1992), Ferrera (1996) and Bonoli (1997). The countries taken for the analysis were, on the one hand, post-communist countries which joined the European Union in 2004 or in 2007 and, on the other hand, OECD

countries classified as social democratic (Norway, Sweden), liberal (Australia, United States), conservative (France, Germany) and southern-European) (Greece, Spain)<sup>1</sup>.

**Tab. 1: Defamilisation indicators, 2011**

Country	Relative female activity rate	Maternity leave compensation for duration covered (per cent of normal wages)	Compensated maternity leave duration (number in weeks)
Australia	-12,39	0	0
Bulgaria	-8,02	90	32
Czech Republic	-16,47	60	28
Estonia	-6,78	100	20
France	-8,60	100	16
Germany	-10,78	100	14
Greece	-20,21	100	17
Hungary	-11,98	70	24
Latvia	-5,77	100	16
Lithuania	-4,16	100	18
Norway	-4,30	100	47
Poland	-13,76	100	20
Romania	-14,75	85	18
Slovakia	-15,75	55	28
Slovenia	-7,41	100	15
Spain	-13,20	100	16
Sweden	-5,06	80	69
United States	-11,08	0	0

Source: OECD Database, ILO Database.

Two elementary forms of cluster analysis, hierarchical and K-means, will be used to group countries similar in terms of the degree of defamilisation, so according to the indicators used – countries of similar labour market conditions (professional activity of women in relation to the activity of men) and social policy attitude to the building of women's financial independence from the family during the maternity period (duration of paid maternity leave and amount of maternity benefit).

<sup>1</sup> It should be remembered that defamilisation was obviously not a criterion for selecting all four models. Esping-Andersen distinguished the first three models when analysing 18 selected OECD countries in terms of the degree of decommodification and the kind of stratification they produce in society. The southern model was proposed by researchers who basically agreed with Esping-Andersen's classification, except for the issue of additional regime of a welfare state (Fenger, 2007, pp. 6-8). From this perspective, the analysis presented in this article will provide an answer to the question to what extent the typology of welfare states generated based on defamilisation indicators with respect to highly developed countries coincides with mainstream typologies.

## **Classifying welfare states: Results**

The results of hierarchical cluster analysis are presented in table 2 and figure 1. The data shown in table 2 demonstrates distances between the analysed countries, reflecting the degree of their diversity in terms of the adopted defamilisation criteria. Some countries are positioned very close. This is the case of the United States and Australia where the difference between them is 0.34, Czech Republic and Slovakia – 0.22, Baltic countries – with the maximum distance of 0.58 between Estonia and Lithuania. Such closeness between these countries need not be surprising if one considers cultural community or the community of historical experience. But these reasons are not sufficient for more extensive conclusions, for example concerning the similarity of all post-communist countries in terms of defamilisation or the creation of one cluster or more clusters within the group of states defined in this way. It turns out that Poland has the greatest closeness to Spain (distance of 0.28) while geographically close Lithuania is the most distant of all post-communist countries to Poland (2.08). In case of Slovenia, the least distant state is France (0.26) and the most distant one is the Czech Republic (2.45).

The two countries mentioned above, Australia and United States, are a special case here. What makes them unique is the exceptionally large distance between this pair and all other countries. The states closest to the United States (apart from Australia, obviously) are Slovakia and Hungary (2.64), whereas in case of Australia – the closest one is Slovakia (2.55). Sweden is the most distinct country in relation to both the United States and Australia (distance of 5.17 and 5.25, respectively). This country is specific as it has no closeness to any other, apart from Norway. Although Norway and Sweden constitute a distinct cluster, just like Australia and the United States, Norway is not as "lonely" as Sweden. Bulgaria is relatively close to it (distance of 1.28).

An analysis of a dendrogram brings conclusions on the distinguishing of four clusters. The first cluster is formed by Australia and the United States. The second cluster is formed around the pair of Poland and Spain, joined subsequently by Romania, Greece and the pair of Czech Republic and Slovakia. The third cluster comprises Estonia, Latvia, Lithuania and Slovenia, France, Germany which are later joined by Hungary and Bulgaria. The fourth cluster is formed by Norway and Sweden.

**Tab. 2: Hierarchical cluster analysis proximity matrix**

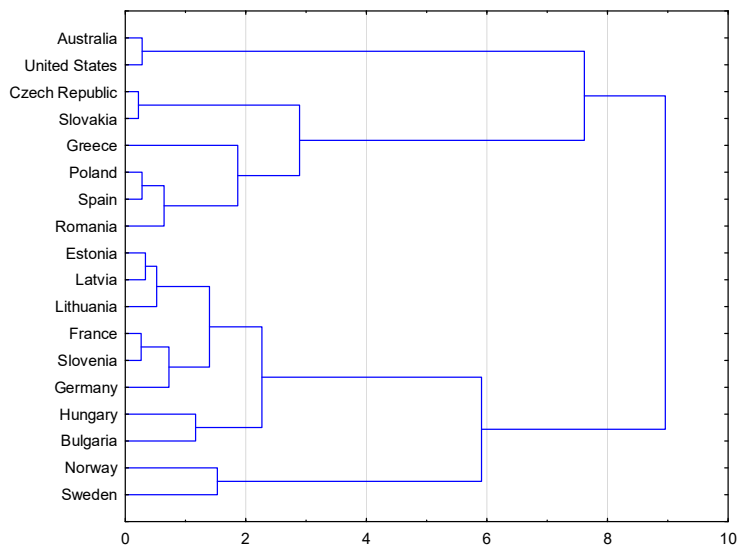
	Australia	Bulgaria	Czech Rep.	Estonia	France	Germany	Greece	Hungary	Latvia	Lithuania	Norway	Poland	Romania	Slovakia	Slovenia	Spain	Sweden
Bulgaria	3,55																
Czech Rep.	2,70	2,06															
Estonia	3,53	0,86	2,48														
France	3,33	1,06	2,23	0,47													
Germany	3,21	1,32	1,95	0,94	0,49												
Greece	3,66	2,82	1,63	2,91	2,51	2,05											
Hungary	2,63	1,17	1,05	1,47	1,28	1,15	2,05										
Latvia	3,53	1,16	2,73	0,33	0,61	1,09	3,12	1,70									
Lithuania	3,73	1,25	3,00	0,58	0,97	1,45	3,47	1,96	0,37								
Norway	4,61	1,28	3,14	1,79	2,17	2,51	3,93	2,39	1,98	1,83							
Poland	3,33	1,49	1,45	1,51	1,14	0,75	1,41	1,03	1,75	2,08	2,66						
Romania	2,89	1,71	1,06	1,79	1,41	1,01	1,27	0,85	2,00	2,34	2,95	0,52					
Slovakia	2,55	2,00	0,22	2,43	2,21	1,96	1,82	0,97	2,67	2,93	3,08	1,53	1,14				
Slovenia	3,39	1,12	2,45	0,34	0,26	0,73	2,77	1,47	0,36	0,73	2,13	1,41	1,67	2,42			
Spain	3,24	1,54	1,61	1,41	1,00	0,54	1,52	1,08	1,61	1,96	2,75	0,28	0,58	1,67	1,25		
Sweden	5,25	2,44	3,63	3,18	3,49	3,74	4,68	3,23	3,41	3,28	1,53	3,67	3,85	3,55	3,50	3,83	
USA	0,28	3,49	2,81	3,45	3,28	3,19	3,80	2,64	3,43	3,60	4,51	3,37	2,95	2,64	3,31	3,26	5,17

Note: Ward method; Euclidean distance

Source: own calculations based on data from Table 1.

K-means cluster analysis confirms the composition of all clusters, except for one country, which is an exception here – Hungary. According to the method, it should be classified in cluster 2. The analysis also allows for determining the distance between the centres of individual clusters, so it offers a view of the scale of similarities/differences between individual groups of countries. The greatest distance is typical of clusters no. 1 and 4 (2.79); the smallest – clusters no. 2 and 3 (1.03). Distances between individual clusters are presented in table 3.

**Fig. 1: Hierarchical cluster analysis dendrogram (18 countries)**



Note: Ward method; Euclidean distance

Source: own calculations based on data from Table 1.

**Tab. 3: Distances between cluster centres**

	Cluster 1	Cluster 2	Cluster 3
Cluster 2	1,70		
Cluster 3	1,95	1,03	
Cluster 4	2,79	1,87	1,48

Source: own calculations based on data from Table 1.

The F-statistic calculation made it possible to determine the significance of individual defamilisation criteria for the discrimination between the clusters. The maternity leave duration variable ( $F = 27.5$ ) and the maternity leave compensation variable ( $F = 27.1$ ) are of

the greatest important in this respect. The economic activity variable is less important ( $F = 19$ ).

## Conclusion

The conducted cluster analysis with the use of defamilisation data for 16 countries of the European Union, Australia and the United States made it possible to group these states into four clusters. The basic conclusion is that if one takes into account defamilisation criteria, post-communist countries do not form a homogeneous group or groups distinct from highly-developed countries; they belong to two of four clusters noted. Importantly, these groups do not represent two extreme regimes of a welfare state (social democratic and liberal) if mainstream typology was to be used. In this case, path dependence may at least partially explain the situation<sup>2</sup>. However, conclusions drawn from the fact that countries belong to specific clusters must be formulated with caution and awareness of the limitations of the analysis.

Firstly, although the distinctness of post-communist countries was not noted in the context of defamilisation as a welfare state modelling tool, this does not mean that if other variables are taken into account, these countries may not form separate clusters, resulting from the implementation of new welfare state models (Draxler & van Vliet, 2010; Fenger, 2007; Ferreira & Figueiredo, 2005).

Secondly, as a result of an analysis, highly-developed countries (Australia, France, Germany, Greece, Norway, Spain, Sweden, United States) are grouped in clusters that correspond to the classification of these countries into mainstream welfare state typologies, which assume the existence of four welfare state regimes. In part, this undoubtedly results from the decision of the authors to choose the most typical or best "matched" countries for individual models in their analysis. Data in table 1 corresponds well with the model perspective of individual kinds of welfare states in which the social democratic model is characterised by universalism both in terms of scope and nature of social benefits available to individuals as civic rights, the liberal model is characterised by the fragmentation of benefits, departure from the common access to benefits and channelling benefits only to individuals

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<sup>2</sup> The concept of path dependence is a source of explanation of the popularity of the welfare state proposed by political sciences, alternative to the power resources theory. It explains the durability of the conquests of a welfare state (also a socialist welfare state) through attachment to a specific trajectory of social policy development. Once initiated, welfare state schemes are not subject to quick and easy modifications due to the complex social and economic links they create. In consequence, changes in the welfare state may only resemble a slow evolution. More on path dependency in the context of the transformations of a contemporary welfare state – see: P. Pierson (1998, pp. 552 and 553; 2001, pp. 414–419).

who are in the worst situation, selected according to specific income and property criteria (means testing benefits), and the southern model – characterised by a considerable difference in the professional activity of men and women, largely conditioned by culture and related to the perception of the role of both sexes in social life.

Thirdly, the analysis was only based on data for 2011. If research is repeated for other periods, this may result in the change of the composition of individual clusters and provide information on countries permanently fixed in a specific cluster (model) and countries which do not fit such a simple classification<sup>3</sup>.

Last but not least, the study uses only three criteria of defamilisation. The incorporation of additional criteria would undoubtedly strengthen the magnitude of the presented results. However, the qualitative rather than quantitative nature of many variables which describe the autonomy of women and their economic independence from the family in the contemporary society can be a limitation in this respect (Bambra, 2007).

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<sup>3</sup> Mainstream typologies are characterised by such impermanence of classification. For example, by replicating research by Esping Andersen, Scruggs and Allan (2006) showed considerable differences (6 out of 18 considered countries) in the classification of countries to specific regimes in relation to the proposal of Esping-Andersen.



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