

# Comparative Studies of Russian and European Welfare Polities

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*The authors provide a scholarly conspectus of comparative studies involving Russian, EU8 and EU15 Welfare Polities. They elaborate the notion of the ‘welfare polity’ and its potential for enhancing comparative studies of welfare institutions, policies and practices. This is accompanied by an overview of trends in comparative studies involving Russian, EU8 and EU15 countries, along with a consideration of how comparative research involving these states can be strengthened. Gaps in the literature and evidence base, including systematic cross-national and temporal data on the design and implementation of social policies and social protection, are highlighted. A shared concern was found with the growth of division and exclusion exacerbated by global economic factors and by state-level policy shifts, a trend especially notable in Russian studies. Fruitful pointers for future research and international collaboration are indicated and the need for further comparative efforts emphasised at a challenging time for geopolitical relations.*

**Keywords:** Comparative research, East-Central Europe, Russia, EU, welfare polity, postcommunist.

## Introduction

Literature on the comparative development of welfare states and social policies in low, middle and high income countries has grown considerably over the last three decades. Debate over the causes of expansion or retraction of welfare programmes and the reasons behind the common or diverse directions and pathways taken by these countries has likewise sprouted vigorously. A recent Themed Issue of this journal, entitled ‘Comparing Russian and European Welfare Polities’, explored a less well examined topic in the literature – namely, convergences and divergences around responses to the ‘new social risks’ faced by West (EU15), East-Central European (EU8) and Russian states (Cook and Titterton, 2023a; Cook and Titterton, 2023b)<sup>1</sup>. These new social risks include the likes of insecure employment and income, population ageing, unsustainable social security systems and large-scale international immigration. In this article, we connect with this Themed Issue by providing a scholarly conspectus of comparative studies involving Russian and European Welfare Polities, along some of the challenging issues raised. Moreover, we further elaborate the notion of the ‘welfare polity’, a concept initially deployed for the Themed Issue, and its potential for enhancing comparative studies of welfare institutions, policies and practices in such regions.

Our article is structured as follows. In the section we provide a discussion of some conceptual and theoretical issues for scholars in this field contemplating appropriate

approaches for making welfare comparisons. We then move on to consider comparative research in Russian, EU-8 and EU-15 welfare politics while the next section includes an overview of the current state of research in Russia. This is followed by a consideration of how comparative research involving this region can be strengthened. We draw the presentation to a close by outlining some fruitful pointers for future research and by underlining the need for further comparative efforts at this deeply challenging time for geopolitical relations in Central and Eastern Europe. Our survey of comparative studies, with its primary focus on Russian, EU8 and EU15 states, is necessarily a selective one. It is based on a wide-ranging literature search of databases including Assia, Google Scholar, Russian Science Citation Index, Social Sciences Citation Index, Social Work Abstracts and Higher School of Economics Moscow Library Databases, using key terms such as comparative research, exclusion, inclusion, welfare, Central and Eastern Europe, and Russia.

### Conceptual and theoretical approaches

The most well known and widely used typological framework for comparative welfare policy studies both globally and in respect of the EU15 and EU8 countries is the welfare regime approach, developed and elaborated by Esping-Andersen (1990, 1996). There is now a voluminous literature on this approach, including numerous critical discussions (see e.g. Arts and Gelissen, 2002; Aspalter, 2006, 2019; Bonoli, 1997; Wood and Gough, 2006). Criticisms include the confusion of ideal and real typification, the lack of incorporation of factors relating to the likes of gender, family and labour, and a perceived bias towards Northern European states. Some, such as Ferrera (1996) and Hantrais (2004), have developed different typologies; Hantrais identified four family policy clusters, as defined in her study of twenty-five EU countries, indicating different ways of balancing the welfare mix between social service provision and family responsibility. Studies such as that by Nygren *et al.* (2018) have attempted to deploy this approach by placing the family at the centre of analysis as a reaction to Esping-Andersen's typology.

We would direct the interested reader to these discussions of typologies, which are readily found within the literature. Here we would simply highlight the major difficulty of lack of fit of such typologies to date in respect of the complex constellations that characterise post-communist countries in terms of welfare developments over time, legacies of historical and ideological patterns of development (see e.g. Inglot, 2008). In the Themed Issue, contributors analysed how historical legacies have interacted with new risks to produce convergences and divergences in contemporary welfare policies (Cook *et al.*, 2023; Prisyazhniuk and Sokhey, 2023; Dugarova, 2023).

A lively debate has been taking place over 'pathways' for welfare state development within countries in the wider region. Some analysts have drawn inspiration from historical institutionalism, a comparative approach to studying organisations, typically using case studies (Inglot, 2008). Concepts such as 'path dependence' have influenced debates in political science – for example, as elaborated by Pierson and Skocpol (2002). Typically the question is whether the pursuit of public policies is 'path dependent' or 'path departing', i.e. conforming to or deviating from directions expected from historical developments or institutional factors. This debate has been influential in welfare state studies, including with respect to the post-communist region. Examples include edited collections by Schimmelfennig and Sedelmeier (2005) and Cerami and Vanhuyse (2009).

Some richly detailed studies of welfare development in historical context exist for the Visegrad countries of the Czech Republic, Hungary and Poland (Inglot, 2008). Some writers have aligned with institutional approaches, while others have looked to historical legacies (Cerami and Vanhuyse, 2009; Haggard and Kaufman, 2009). A difficulty of the dominance of this approach has been the exploring of other explanatory approaches and production of accounts at times heavy on theory and light on empirical foundation (e.g. Cerami and Vanhuyse, 2009).

This debate has helped to shift the discourse away from the confines of the dominant Western perspective mentioned by Midgley (2004). Following Midgley (2004) and Polese *et al.* (2014), we suggest that the dominance of this discourse has limited the development of comparative study of welfare and inclusion in the post-communist region and overlooked the distinctiveness of countries and forms of informal welfare. However, the discussion has tended to drift into abstruse and abstract argumentation at the expense of clarity and connection with concrete contexts. Simply put, history and politics come into play when it comes to explaining the pathways pursued or deviated from during welfare state evolution (Cerami and Vanhuyse, 2009; Haggard and Kaufman, 2009). The post-communist region has produced relatively unique constellations of institutional arrangements and historical legacies of development (Inglot, 2008; Inglot *et al.*, 2012). Cook (2013) has contributed to the debate by extending the 'politics matters' framework to post-communist countries such as Russia, Poland, Hungary, Belarus and Kazakhstan. She argued that this framework requires modifying, as it 'misses processes of corruption and informalisation that have been important in the post-communist context' (Cook, 2013: 30).

Explanatory strategies need to account for this more effectively than has been the case to date. Thus a more nuanced approach is called for in explaining commonalities and diversities within post-communist countries (Kuitto *et al.*, 2012; Orenstein and Haas, 2002; Piotrowska and Rae, 2018; Sengoku, 2004; Vandembroucke, 2017), including studies of inclusive strategies (Stepaniuk, 2019). We contend there has been a lack of fit between conceptual frameworks and empirical realities, presenting another hurdle for comparative study in this field. A shortage exists of the development of middle-range constructs to help improve this fit; these could include mediating processes and mechanisms of the sort implicated in the informal management of welfare, such as coping strategies (see Titterton, 2006 in respect of social policy in Russia) and how they link with the emergence of new forms of stratification in socio-economic terms, such as the rise of the 'new poor' and effects of the informal sector in conjunction with political changes in Russia (see e.g. Davidova, 2009; Rose *et al.*, 2006; Timofeyev, 2012; Zelenev, 2005).

In their article for the Themed Issue, Cook and Titterton (2023b) discuss the concept of welfare polity, which embraces the normative framework, policy capability, institutional capacity, and social and political movements that shape and constrain welfare state change. The notion is based on the work of scholars based in other disciplines, including Gill (2015), Joerges *et al.* (2005), Kaiser and Meyer (2013) and Schulz-Forberg and Str ath (2012); the welfare polity concept encapsulates this in order to reconsider the interaction of state and market, associated political philosophies, as well as opportunities for political and institutional renewal.

For Cook and Titterton (2023b), this concept has greater explanatory potential than the more commonly used term welfare regime, often deployed in the comparative literature (see e.g. van Kersbergen and Vis, 2014). They point to its advantages, which they deploy to structure comparisons. The concept of 'welfare regime' has tended to be

used to designate a fairly stable formation or static type that follows a single distributive logic (i.e. such as social democratic or liberal). The welfare polity approach, by contrast, allows for considerably greater scope and flexibility when comparatively analysing political economies that defy easy categorisation across a region as varied as Europe, Asia and other regions.

Welfare polity represents a much more fluid concept that better characterises and captures welfare state change in the currently turbulent politics of the region. This politics often produces fragmented and reactive welfare policies that follow no dominant distributive logic. The modernisation and reform agendas within these welfare polities are significant and worthy of attention for social policy analysts. Some of the commonalities and specificities to be found in states that have highly divergent political economies can accordingly be more effectively highlighted. The concept, we contend, offers scholars and analysts intriguing potential for making structured comparisons when considering welfare developments in different countries. It allows for a more nuanced consideration of a rich and diverse mix of factors and determinants influencing welfare policy choices. Different welfare polities can be identified within a comparative framework, of which four may be of particular interest: 'Authoritarian', 'Populist', 'Social Democratic' and 'Liberal'. In addition, three of the key tensions involved in understanding welfare dimensions in these polities, we further suggest, are: solidarity/marginality, formality/informality and inclusivity/exclusivity. Each of these dimensions offer windows revealing the ways in which welfare has been restructured within such polities. This is an indication of the potential of the welfare polity concept for stimulating alternative and innovative analyses in a comparative manner.

The welfare polity in the wider post-communist region and in countries like Russia is of mixed composition, shifting over time, consisting of elements that coalesce and regroup according to the strength of particular components, like elite formation, economic performance and dynamics of social movements. This can be seen, for example, in relation to developments in social protection and safety nets and policy shifts such as deinstitutionalisation for groups such as children and older people (Kulmala *et al.*, 2021; Kulmala *et al.*, 2023). In their descriptive account of post-soviet welfare reforms, Cook and Iarskaia-Smirnova (2023) claim significant progress has been made, while acknowledging the continuation of forms of social exclusion.

Characterising the Russian Welfare State has been both an analytical and terminological challenge. Broadly speaking, there are two distinctive camps: those who, such as Logvinenko (2020), consider the Russian Welfare State to be authoritarian and those writers who, such as Matveev and Novkunskaya (2020), argue that it is now neoliberal in essence. Many writers occupy a point along this continuum, leaning towards the study of authoritarian regimes' effects upon the welfare sector (e.g. Cook *et al.*, 2019) or towards logging increasing incursions of neoliberal marketisation of welfare services (e.g. Rasell 2009; Rutland, 2013). The emergence of a trend such as outsourcing provision to socially-oriented non-governmental organisations (SONPOs) has attracted attention (Cook *et al.*, 2021), as has the development of public/private mixes in healthcare. Such mutable forms of state and market interaction represent a notable feature of the welfare polity. In terms of the discussion set out above, in Russia the authoritarian welfare polity appears currently dominant. Thus we might expect to see an emphasis on exclusions, tightening of eligibility criteria and narrowing of definitions of 'deserving' groups, in ways that help to exclude groups such as care leavers, migrants, people with disabilities and older people in poverty.

The paradoxical combination of tightening restrictions on and creating incentives for civil society actors (Bogdanova *et al.*, 2018) is also an anticipated feature.

We therefore wish to issue an invitation to scholars to explore the potential of the welfare polity concept, along with its strengths and limitations, for enhancing the knowledge basis of comparative studies in this and other regions of welfare policy and practice. We now turn to consider the present state of comparative studies of the latter in respect of Russia, EU8 and EU15 countries.

### **Comparative studies involving EU8, EU15 and Russian welfare polities**

Comparative studies of Russian and European welfare polities both face problems familiar to students of comparative studies and some challenges that are specific to the region we are considering. International comparative research in the field of welfare policy is now well established as a distinctive body of studies. As Cochrane (1993) noted, it can 'deliver useful insights by highlighting arrangements which are frequently taken for granted' while developing a 'fuller understanding of welfare systems in a range of countries' (1993: 1). Overviews of comparative research are to be readily found in an expanding literature (Baldwin, 1996; Clasen, 1998; Cousins, 2005; Ginsburg, 1992; Hantrais, 2009; Hantrais and Mangan, 1996; Higgins, 1981; Hill, 1996; Kennett, 2014; Leibfried, 1992; Mabbett and Bolderson, 1999; Mills *et al.*, 2006; Nygren *et al.*, 2018; Oyen, 1990).

However, Midgley claimed that while comparative social policy inquiry in Europe and North America has produced a 'substantial and significant corpus of knowledge', the field 'still faces substantial challenges' (2004: 220). Nearly two decades on, these challenges not only remain but have stiffened considerably with the deepening of geopolitical contestation.

The field of comparative research in welfare studies has witnessed a lively debate, particularly since the publication in 1990 of Esping-Andersen's seminal analysis of welfare regimes and subsequent refinements (1990, 1996), already mentioned above. There have been numerous critical exchanges on the suitability of his categories and methodology, which the interested reader can find in the likes of Broka and Toots (2021), Fenger (2007) and Kasza (2002). Questions have been raised concerning the geographical and institutional focus and suitability to welfare states outside of Northern Europe, as well as accounting for aspects such as gender disparities and the nature of work (Ferrera, 1996; Pascall and Kwak, 2005). Comparative studies in social policy in the post-communist region are arguably less developed than studies of their Western counterparts. Our findings indicate that they have been fewer in quantity and variable in terms of their approach but such studies are gradually increasing over time (Auth, 2010; Deacon, 1993, 2000; Keune, 2010; Kuitto, 2016; Sengoku, 2004). Moreover, within comparative studies of Russian and European welfare polities we found overall a growing and shared concern with divisions and exclusions generated by international economic trends and by national level reforms of policies and programmes.

International comparative studies involving the post-communist region may be divided into a range of subcategories, which typically share a conceptual and empirical concern with wellbeing and welfare arrangements in a cross-national perspective. We classify the studies conducted in relation to this region into six broad categories. These occasionally overlap and are restricted to cross-national research; studies contained in the grey literature, typically commissioned by international bodies, think tanks and Civil

Society Organisations are largely excluded. We acknowledge that these categories are approximate and not mutually exclusive and do not claim to provide a comprehensive survey. Finally, Russian comparative studies are considered in the next section.

The first category is the study of welfare regimes, which typically employs a political economy-type approach (Wood and Gough, 2006), based on statistical data. Examples include Aidukaite (2009); Cook (2007); Fenger (2007); Haggard and Kaufman (2009); and Kuitto (2016). Here the research framing is usually inspired from wide ranging cross-national typologies, such as Esping-Andersen's typology and its revisions (1990). There have been efforts to refine such typologies to include the Central and Eastern Europe region (Adascalitei, 2012; Cerami, 2009; Fenger, 2007; Lauzadyte-Tutliene *et al.*, 2018; Orosz, 2019), as well as account for gender-based perspectives (Pascall and Manning, 2000). Kovacs *et al.* (2017: 213) have advised that 'post-socialist welfare states within the European Union should not be categorised as a more or less coherent regime type'.

Second, there are studies of social transfers and programmes, including welfare, as well as social protection and safety net measures, typically deploying official data. We include here studies of specific vulnerable groups. Examples include: Emigh *et al.* (2018); Fylling *et al.* (2019); Maszczyk (2020); Noelke (2008); Orenstein (2009); Rat (2009); Standing (1996); and Szeman *et al.* (2021). A third category covers studies of public opinion, attitudes and values in relation to the welfare state and support, using survey data (Cook, 2013; Popic and Schneider, 2018; Roosma *et al.*, 2012).

Fourth, there are studies, usually using mixed methods, of social and political movements and organisations, at both international and local levels, influencing social policy and the supply of welfare programmes (e.g. Deacon and Hulse, 2007; Lugosi, 2018; Schaft and Ferkovics, 2017; Vanhuysse, 2006). The fifth category comprises studies, again mostly qualitative, that adopt an explicit dimension of a social and demographic nature. For example, research approaches can be found with an explicit focus on the family or variables like gender, ethnicity, age and health state; illustrations include An and Kulmala (2021); Auth (2010); Jehoel-Gijsbers and Vrooman (2008); Kuuse *et al.* (2021); Szelewa (2021); Szeman *et al.* (2021); Theobald and Kern (2009); and Titterton and Smart (2015).

Finally, there are some comparative surveys, typically quantitative, of welfare state trends associated with residualism, retrenchment, recalibration and responses to perceived threats such as new social risks (Aidukaite *et al.*, 2021; Cook, 2007; Cook and Titterton, 2023b; Hrast and Dobrotic, 2022). Occasionally these are linked to selected political features such as authoritarianism or populism (Fenger, 2018) and are usually wide ranging in their scope. Further comparative studies relating to what we have referred to above as 'authoritarian welfare polities' would be a particularly helpful addition to the literature trends indicated above.

### Current state of comparative studies in Russia

Comparative welfare research in Russia offers something of a contrast. While it is apparent that this forms much more of a mixed bag, it is unified by a concern predominantly with forms of exclusion created by economic and political reforms associated with 'modernisation' in the transition from the state-controlled economy of the United Socialist States of Russia towards a market-led economy. This includes subsequent policy shifts and impacts on various population subgroups, sometimes perceived as interlinking with broader

international trends, such as neoliberal influenced reforms of welfare including privatisation or attempts to move away from predominantly statist forms of provision, reflected in outsourcing and public/private mixing.

One major conceptual lens has been human capital as a factor of socio-economic development in social well-being, income inequality, poverty, economic instability and reforms. These studies are often based on quantitative analysis. The evidence base includes survey data e.g. Russian Longitudinal Monitoring Survey data and official statistics. In addition, legislation reforms are systematically scrutinised (Ovcharova and Biryukova, 2017; Tikhonova, 2019; Tarasenko, 2021). Various forms of social inequality among social groups have been studied using comparative statistics e.g. for older people (Varlamova and Sinyavskaya, 2021). Regional disparities in economic prosperity, longevity and quality of life have also been examined (Zubarevich, 2019; Gorina, 2019). Some have pointed to the necessity of a mix of schemes based on means-tested and universal approaches (Ovcharova and Gorina, 2017; Maleva and Avraamova, 2017; Mau *et al.*, 2020). Others emphasise the necessity of combining these approaches and argue that it would be ineffective and unfair to apply the same approaches to those who need increased benefits and access to common services and those who would prefer purchasing high-quality social services (Kuzminov *et al.*, 2015). Sinyavskaya (2020) addressed the relevance of universal welfare state arrangements that proved their effectiveness under the current crisis; she argued that the basis of a new social policy should be programmes of universal assistance to those in need, similar to a guaranteed minimum income and various solutions within social investment. Researchers have advocated policies of active ageing, employment in old age (Bogdanova, 2016; Bogdanova and Grigoryeva, 2020), combating poverty via a social contract, socialisation of migrants and prioritising skilled labour migrants (Kuzminov *et al.*, 2015).

Exclusion and marginalisation issues are studied often through the systematic use of statistics and quantitative surveys. This includes studies of discrepancies in male and female employment (Sinyavskaya and Cherviakov, 2021; Varshavskaya, 2015) and falls in the wages of workers (Tikhonova, 2015). In contrast, the topic of exclusion of sexual minorities (Soboleva and Bakhmet'ev, 2014), people living with HIV/AIDS (Nartova *et al.*, 2020), drug addicts (King *et al.*, 2019; Meylakh *et al.*, 2017), migrants (Kashnitsky, 2020), adults with disabilities and families of children with disabilities (Kurlenkova, 2017), older people (Grigoryeva and Sidorenko, 2019), children left without parental care (An and Kulmala, 2021; Bogdanova, 2017; Kulmala *et al.*, 2021; Kulmala *et al.*, 2023) are typically studied using qualitative methods. The everyday life of care workers and social service organisations has been considered in ethnographical perspective (Romanov and Kononenko, 2014). Intensive long-term care for older relatives with dementia has been the subject of study (Zdravomyslova and Savchenko, 2020). Results reveal that family care remains a cultural norm in the Russian context. Care practices are being modernised while the burden on caregivers is increasing but this does not receive sufficient institutional support. Dmitrieva (2018) demonstrated that carers attending IT training courses has little effect on the level of employment or the desire to continue working. In analysing maternity care services in the context of welfare restructuring in Russia, Matveev and Novkunskaia (2020) argued that neoliberalism lies deeply embedded in policy, while Gurova (2018) deployed the example of the transition from soviet to neoliberal governance of educational institutions.

Social policy reforms have been uneven and, despite some progress, have produced mixed outcomes, giving rise to new inequalities (Temkina and Zdravomyslova, 2018; larskaia-Smirnova and Romanov, 2012) and discriminatory practices (Kozina and Zangieva, 2018). Attempts to develop an inclusive culture in educational and social services represent a new perspective in the Russian context (Antonova, 2014; larskaia-Smirnova and Goriainova, 2022). Issues of social inequality, exclusion and inclusion have been discussed in relation to disability policies (Rasell and larskaia-Smirnova, 2014), along with public attitudes (Salmina, 2014), employment inclusion (Frolich *et al.*, 2023), construction of social problems and representations of social policy, inequality and social work in mass media (larskaia-Smirnova *et al.*, 2016; larskaia-Smirnova *et al.*, 2021; larskaia-Smirnova and Lyons, 2018; Yasaveev, 2020; Nizamova, 2020). Social policy ideologies have been critically scrutinised, with contradictions and dilemmas in current reforms examined and issues of discrimination affecting various social groups explored (Cook and larskaia-Smirnova, 2023; Grigoryeva and Sidorenko, 2019; Logvinenko, 2020). The voice of service users is reflected in studies of empowerment strategies, advocacy and self-help efforts, which use qualitative methodology (Nartova *et al.*, 2020).

Cross-national comparisons are rare but there exist some studies of factors affecting use of preschool services (Pelikh and Tyndik, 2014), children's rights implementation (Schmidt and Shchurko, 2014), subjective well-being (Salnikova, 2019) and public attitudes to the welfare state (Fabrykant, 2016). The role of nongovernmental organisations in social policy is a new topic, often studied in collaboration between Russian and international authors (Tarasenko and Kulmala, 2016; Bindman *et al.*, 2019; Sätre *et al.*, 2020). To explain civil society developments, researchers have made use of interviews and survey data, as well as compared statistics of the rise of non-governmental social service providers among Russian regions to demonstrate the peculiarities of the state welfare regime (Cook *et al.*, 2021; Mersiyanova *et al.*, 2017). Changing state and nongovernmental organisations relationships have been studied in terms of the political and policy context of the relations between state and nonprofit sector, highlighting the consequences of changes (Bogdanova *et al.*, 2018).

Challenges faced by the welfare systems of Russia and European countries due to the COVID-19 pandemic focused critical attention on social protection and health-related measures and their effects on various groups (e.g. Walker, 2023). Dugarova (2023) compared policy responses to economic and social impacts of the COVID-19 crisis in Russia and Finland. The pandemic was an exogenous shock to welfare states across Europe and globally. Russian and Finnish governments responded with multi-faceted anti-crisis relief packages. Both allocated support to families, workers, businesses and vulnerable social groups, in addition to planned social expenditures.

Comparative studies, however, are generally lacking in this area. The analytical reports that contain comparative information published by international organisations are based on key strategic and policy documents of the international organisations (e.g. World Health Organisation, UNICEF), academic publications, and contributions of experts in social protection, health and wellbeing. Comparative analysis of inclusion of children with migration experience into the educational settings in the host countries requires selection of the variables driven by the specific theoretical framework, e.g. multiculturalism, exclusion, factors of students' performance, barriers and resources of social integration in the conditions of concentrated disadvantage. Analytic reports by international organisations present comparative policy analysis and recommendations in relation to



human rights and sustainable development millennium goals (Borgonovi *et al.*, 2015). They aim to provide an overview of the main child rights violations and equity gaps in the realisation of rights, key barriers and bottlenecks. However, such reports typically do not represent a systematic and comprehensive review of countries' issues and actions. Their aim is to stimulate debate and inspire action among governments, international organisations and policymakers on what is possible to protect vulnerable groups during the crisis (Lima *et al.*, 2020).

The comparative cross-national research articles in journals and monographs can be considered as case studies where each country becomes a case for an analysis structured by variables selected according to a chosen framework. Nemeč *et al.* (2021) compared policy responses to the COVID-19 pandemic and their probable results in three countries: the Czech Republic, the Russian Federation, and the Slovak Republic. In addition to the multiple case study approach, researchers have also used qualitative comparative policy analysis. They found that the COVID-19 health outcomes differ significantly among the selected countries and in different time periods. In a similar vein, Dugarova (2023) emphasised the role of economic resources in determining the comparative scale of expenditures, while government capacities and priorities determined how relief funds were distributed differentially to benefit specific social groups and economic sectors. The study by Nemeč *et al.* (2021) also highlights specificities and similarities of the COVID-19 health outcomes of selected post-Soviet countries in comparison with worldwide patterns. The study confirmed that in the three countries studied, the timing of policy responses and the success in motivating compliance represent important critical factors in containing the pandemic. The selected countries, according to this analysis, achieved different anti-pandemic results, probably because the timing of their public policy responses and their success in promoting compliance were different. A specific feature of this sample is that 'democratic' countries (Czechia and Slovakia) were claimed to be more successful than the more authoritarian regime in Russia.

Pension reforms attract attention of scholars who mostly study national cases (e.g. Sinyavskaya, 2017), while comparative analysis, including Russia and European countries, is less popular. In their comparative case study of pension reforms in Poland and Russia, Kowalczyk-Rólczyńska *et al.* (2017) chose such variables as contribution level, retirement age and replacement rate. According to their study, despite the need for long-term stability, persistent volatility can be observed in the pension systems employed in Poland and Russia, reflected mostly in changes in the legal regulations and the principles of calculation and obtaining pension benefits; this had the deleterious effect of limiting participants' confidence in the system. Prisyazhniuk and Sokhey (2023) compared reforms in Russia and Hungary designed to reduce the short-term burden and improve long-term sustainability of pension systems in both states. Both states have accumulated expensive pension obligations, with their pension dependency ratios are worsening as smaller cohorts enter labour forces. Contrary to the expectations of the authors, they found instead that these reforms succeeded more readily in Hungary, while in Russia they were slowed by bureaucratic infighting and inadequate information about popular expectations.

Comparative cross-country research into pro-natalist policies combines discourse and policy analysis embracing statistical data. The analysis provided in scholarly articles and international organisational reports (Edenborg, 2021; Scigliano, 2021) would suggest that pro-natalism in Russia and Europe is interwoven with nationalist and religious discourses. The authors view the nationalist neoconservatism as a new transnational

phenomenon combining critic of gender 'with a critique of neoliberalism and globalisation' (Graf and Korolczuk, 2022: 164). The success of populist movements in identifying gender as a problem has been described as the 'symptoms and consequences of deeper socio-economic, political and cultural crises of liberal democracy' (Kováts, 2017: 185). Cook *et al.* (2023) focused on efforts by governments in Russia, Poland and Hungary to stem serious population decline that has depleted labour resources. All three governments responded to what have been seen as demographic threats with mixes of pro-natalist incentives, support for families, restrictions on women's reproductive rights and re-traditionalising ideological pressures.

### Strengthening comparative research involving Russia, EU8 and EU15

The development and funding of coherent programmes of comparative studies of welfare and inclusion to address existing knowledge gaps would be of particular value to scholars, policymakers and donors. Currently there is much concern among governments and agencies about comparative learning in terms of policies and programmes for refugee populations and internally displaced populations arising from geopolitical conflict, including the waves of those fleeing or displaced by the conflict in Ukraine. Other groups of concern include retirees whose pensions leave them in poverty, migrants who lack the social rights of citizenship, children who are not educated or integrated in their countries of immigration and those who have lost access to income and connections to formal welfare institutions during the coronavirus pandemic. Such examples can help provide a valuable illustration of the specificity of lived experiences, transitions in life and inclusive policies and practices in diverse aspects of comparative contexts. This includes the role and nature of mediators such as the informal management of personal welfare, as in the case of coping strategies in such contexts (Titterton, 2006; Titterton and Smart, 2015). In future research, scholars could usefully consider the development of wellbeing and provision of welfare in a holistic way, rather than mainly focus on state-provided forms of welfare. In the context of post-communist countries, care supplied by the informal sector, as well as the non-governmental sectors, has been an important feature (see e.g. Cook, 2013; Davidova *et al.*, 2009; Polese *et al.*, 2014). This would fit well with the formality/informality tension of the welfare polity mentioned earlier.

Fresh comparative efforts could also stimulate methodological innovation, which is presently rather limited in the region, and encourage the building of comparative datasets. Existing datasets include the likes of European Social Survey, International Social Survey Programme and European Values Study (Ferragina and Deeming, 2022). Anyone familiar with European databases will recognise issues associated with definition and coverage, the inclusion or otherwise of Russian data, and selection of substitute indicators intended to make up for gaps, not always an ideal measure. We would draw attention to the pressing need for the development of systematic cross-national and temporal data on the design and implementation of social policies and social protection. This is something called for by several researchers over the years with respect of other regions of the world (see e.g. Mares and Carnes, 2009).

We would very much like to see further comparative research efforts in collaboration with international scholars involving Russia and other post-communist states alongside Western nations, particularly on the topic of integration and inclusion of socially excluded groups. The funding and encouragement of knowledge exchange networks and

opportunities, currently frozen due to the Ukraine conflict and continuing impacts of the coronavirus pandemic, would be an extremely helpful first step to take.

## Conclusion

Despite the welcome growth of comparative studies of Russian, EU8 and EU15 welfare polities, notable gaps remain in the literature and in the evidence base. This is particularly the case in terms of the choice of conceptual and methodological approaches and availability of systematic cross-national datasets relating to welfare policy design and implementation. These lacunae presently represent a stumbling block for fruitful comparisons between Russian and European welfare polities. They also raise the question of how far this body of studies adds up to a coherent body of knowledge, which currently remains something of a moot matter. Nonetheless, we found a shared concern across these welfare polities with the growth of division and exclusion exacerbated by global economic factors and by state-level shifts in policy responses, a trend especially notable in Russian studies. This chimes with the inclusivity/exclusivity tension of the welfare polity indicated earlier, though analytical interlacing with the other key tensions of solidarity/marginality and formality/informality would be valuable.

We have proposed that for purposes of comparative study, the concept of welfare polity has rich potential. This can be brought to bear upon specific topics of policy concern, such as responses to financial or public health crises, while there is much to learn from the study of authoritarian welfare polities. An implication for comparative welfare studies is that we need to encourage and facilitate further chances for cross-country comparison activities. These are particularly important in the current context of the dire state of international relations, not least involving those states presently embroiled in conflict in the Central and Eastern Europe region, such as Russia and Ukraine, along with Belarus and Moldova.

Any such efforts would do well to include the scope for inter-country and intra-country collaborative efforts, network building, sharing lessons and knowledge exchanges. The transfer of knowledge about effective approaches and methods to enhance social inclusion and social protection would be especially useful in this respect. The sharing of research concerning commonalities and diversities within these Russian, East-Central and West European countries and within the post-communist region itself represents an important task, as well as making this available and accessible to audiences of policy-makers, professionals, civil society organisations and service users and their family carers.

Meeting these challenges, and filling the gaps in knowledge, through coherent programmes of interdisciplinary research and development, provides a valuable focus for scholars and donors in the region. Bringing together research, policy and practice communities through comparative studies of welfare will create opportunities for exploring synergies and complementarities within this region and globally. Moreover, in the context of the tense geopolitics and open conflict currently characterising the region, the need for such scholarly efforts reinforced by international cooperation has become all the more pressing.

## Note

1 The EU15 first fifteen members of the EU are: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and United Kingdom.

The EU8 states that acceded in 2004 are: Czech Republic, Hungary, Poland, Slovakia, Slovenia, Estonia, Latvia and Lithuania. We treat these two groups as distinct due to communist and post-communist characteristics and legacies of the EU8 states.

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