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Welfare and Citizenship: The Case for a Democratic  
Approach to the Welfare State

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### Abstract

The relationship between welfare and citizenship has been a key topic in political and academic discourses, and this interrelationship is still far from being unambiguous. This article reviews mainstream approaches to this relationship and argues that shifting our focus to an alternative perspective – viewing welfare as an agent of citizenship socialization – provides a more comprehensive picture. This approach broadens our understanding of the functions of welfare, being a key agent of the democratic institutional setting, and demonstrates the inextricable interrelationship between civil, political and social citizenship, thus allowing for a deeper understanding of the mechanisms through which apparent political inequalities are reproduced in practice. The paper discusses the functions of welfare institutions in the transition of Central and East European countries into democratic market economies and the establishment of their neoliberal political economies, with a particular focus on the Hungarian transition. The paper argues that the undemocratic, disempowering institutional characteristics and practices of the post-transition welfare regime in Hungary (such as the lack of information provided, the meagerness of benefits, the shame induced by treatment experienced in welfare offices and recipients' acute feelings of vulnerability vis-à-vis welfare administrators and politicians) diminish recipients' perceptions of their democratic subjectivity.

*Keywords:* Welfare, Citizenship, Citizenship Socialization.

## *Introduction<sup>1</sup>*

Pateman (1970) demonstrates how democratic citizenship became a central concept of Western political thought, and others show that it is in fact a key notion in political thinking and action outside Western democracies, too (Lister, 2003; Dagnino, 2005; Kabeer, 2005; Houtzager et al., 2007). Today's momentous social and political developments have led to a renaissance of the concept of citizenship: the resurgence of transnational migration, a flood of refugees indicating the devastation of millions, the blurring of national boundaries, and on-going discussions about EU citizenship put the concept at the center of academic as well as political discourses worldwide. And this re-emergence affects debates on the welfare state<sup>2</sup> as well. Discussion of the interrelationship between the welfare state and citizenship is far from new. This article reviews three key conceptualizations of this interrelationship and argues that shifting our focus to an alternative perspective – viewing welfare as an agent of the reproduction of democratic subjectivities – provides a more comprehensive understanding of both democratic citizenship as a concept and the functions of the welfare state, as well as their interrelationship. In this way this paper demonstrates that the system of welfare institutions is a core *political* instrument rather than a mere technical tool of social policies.

## *Idealist Views: Welfare as an Attribute of Citizenship*

The key theoretician of the idealistic position that views welfare as an inherent attribute of citizenship is unquestionably Marshall (1965), who conceives of citizenship as a normative ideal, that is, a 'status bestowed on those who are full members of a community [...] against which achievement can be measured and towards which aspiration can be directed' (92). Marshall's theoretical innovation contests the homogeneity of citizenship by describing it as a tripartite entity that emerged through a historical evolution of rights constituting civil, political and social citizenship.

By conceiving of social citizenship as a set of elements ranging from 'the right to a modicum of economic welfare and security' to 'the right to share to the full in the social heritage and to live the life of a civilized being according to the standards prevailing in the society' (78) Marshall explicitly conceptualized social protection as an inherent part of citizenship. In this way his concept of social citizenship shifted the welfare-citizenship nexus from an either/or relation (paradigmatic in Poor Law times, when, if on the dole, the individual in practice ceased to count as a member of society) to an intertwined association in which social rights modify (though do not eliminate)

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<sup>1</sup> This paper was written on the occasion of the 70<sup>th</sup> birthday of Júlia Szalai, a friend, a mentor, and one of the most active and influential social scientists not only in Hungary, but internationally. I am forever indebted to Juli for making me truly understand the power dynamics of poverty and inequalities, supporting me throughout the process of becoming a social scientist, and helping me not to lose focus about the true stakes of this profession.

<sup>2</sup> If not otherwise specified, this paper uses the term 'welfare' as a synonym for the welfare state as an institutional setting. In what follows, the terms 'welfare' and 'welfare state' refer to the encompassing design of welfare policies and institutions that cover both services and benefits.

class relations by altering the underlying principles of social and economic relations (Powell, 2002).

This view implies that the idea of citizenship is a matter of civilization in an Eliasian (1994) sense: a set of socially defined rules and norms that determine the status of individuals and social groups. That is, to be a citizen not only means having basic civil liberties, political power and civic responsibilities, but also living a 'civilized' life. And what civilized means (i.e., the norms and standards defining how the individual should live and act as a full member of the political community) have gradually been incorporated in the definition of citizenship. And in later phases of social existence, this enriched idea of citizenship has fed back into what a given society views as wellbeing and deprivation (Townsend, 1979), which in turn, had a significant impact on welfare institutions, too.

However, even though the separation of civil, political and social citizenship is valid analytically and serves the purpose of deepening our understanding of citizenship, it risks the de-politicization of welfare provision by disconnecting social rights from civil and political citizenship. Young (1990) articulates this danger by arguing that welfare institutions tend to institutionalize class conflict, and hence reduce social conflict to a competition over distributive shares, leaving structural matters uncontested. That is, the distribution of the pie is what is publicly debated, while the type and size of the pie and the method of slicing it are left to be decided upon via 'behind-the-curtains' negotiations of government and business elites. In this way, Young contends, the citizen is reduced to a client or consumer excluded from direct participation in decision-making and normative deliberation. As a result, their relationship to the state is privatized and public life is fragmented. This, in turn, depoliticizes the issues and spheres that would help to ground a functioning democratic arrangement.

Studying welfare in terms of citizenship allows for the prevention of such de-politicizing tendencies. Feminist political theory has persuasively demonstrated that the domain of the political cannot be reduced to redistribution, as such reductionist tendencies would omit essential aspects of the political (Fraser, 2003; Young, 1990). Therefore, social protection cannot be restricted to welfare benefits and in this way detached from the political questions of justice, social cohesion and representation. Citizenship is an essentially normative concept, for it is not a mere container of legal-administrative rules, but also a crucial element of our conception of polity as a whole (Faist, 1995). Therefore, citizenship not only defines what welfare provisions the individual is entitled to, but also determines the very shape of society by defining members' rights and responsibilities and the relationship of the two, as well as the relationship between the individual and the state.

### *Liberal Views: Welfare as a Prerequisite of Citizenship*

Overlapping with the idealistic perspective is a spectrum of liberal views of welfare as a prerequisite of citizenship. Liberal theories of citizenship are centered on the individual and the rights that make them a full citizen. Even though liberal authors do not deny the responsibilities entailed in citizenship, they conceive of certain rights as inalienable from the idea of the citizen and therefore detached from duties,

especially from those established by a private contract such as waged work. In the liberal approach both rights and duties are *in principle* universal, therefore neither may be contingent on the other.

A significant body of liberal citizenship literature points to the empowering effects of social rights. First of all, as the means of exerting one's rights and fulfilling their duties, they are necessary for exercising citizenship. Although civil and political rights are the entry ticket to the public sphere, they themselves are not sufficient for effective political advocacy, due to unequal power relations and access to resources (Dahrendorf, 1996). Nonetheless, a lack of social rights not only deprives individuals of the capabilities necessary for fully realizing their citizenship, but also strips them of the basic resources needed for effectively exercising their civil and political rights.

Second, making real choices – private or political – demands certain capabilities, thus full citizenship necessitates some welfare provisions that 'make available to each and every citizen the material, institutional, and educational circumstances in which good human functioning may be chosen' (Nussbaum, 1990: 203). Taking this argument further, a positive concept of freedom (Berlin, 1969) necessarily implies certain capabilities that enable the individual to realize their liberties. From this point of view, social and political citizenship are evidently inseparable, as social rights play an essential role in providing basic capabilities (Plant, 1988).

Furthermore, being deprived of 'a modicum of economic welfare and security' forces people to use their individual resources to sustain their physical existence, and the constant preoccupation with life sustenance leaves

'very little mental space for any general and long-term reflection on issues that go very far beyond their present predicament. [...] Need, then, and the urgency of the demands that it generates, can radically undermine the possibility of civic politics and distort the contribution that an individual participator can make' (King and Waldron, 1988: 428).

King and Waldron conclude that such a material and mental condition makes people vulnerable to political manipulation, which further prevents them from feeling and acting like citizens. Consequently, they associate the provision of welfare with a Rawlsian concept of justice, in the sense that it is a reasonable expectation that people would not agree to a socio-political arrangement that does not offer at least a safety net for those facing hardship (Rawls, 1971). And as a result, they argue, the concept of 'the citizen' must entail certain social rights, as well as civil and political rights in order for individuals to be able to exist and act as citizens.

Even though liberal theories of the interconnection of welfare and citizenship make a clear link between civil, political and social layers of citizenship and in this way effectively politicize welfare provision, I argue that the above literature implies an essentially passive conceptualization of social citizenship and, as a result, overlooks some of its crucial components.

Lister (2003) responds to this conceptual deficiency by focusing on agency as the key to reconciling traditional views of citizenship and developing a new, more inclusive concept. She argues that the traditional liberal concept of citizenship is an

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essentially passive one, as it is conceived of as a status based on individual rights. Moreover, these rights are not only vested in liberal democratic institutions biased towards the interests of the powerful, but also predominantly function as instruments of negative freedom, thus are not conducive to active citizenship. Therefore, Lister argues for a synthesis of citizenship as status and as practice by centering the concept of citizenship on agency. On the theoretical level, resonating with the above arguments of Young (1990), Lister proposes an inclusive concept of citizenship based on the principle of differentiated universalism that allows for the active social and political participation of a wide range of social groups and a re-articulation of the public-private divide. This re-conceptualization would allow for an extension of political agency beyond the public sphere as traditionally conceived of, and thus broaden the scope of citizenship agency so that it includes subjectivities and activities hitherto excluded from it - for instance, bodily and reproductive rights, the domestic division of labor, the labor market, and welfare institutions.

### *Neoconservative Views: Welfare as Compromising Citizenship*

In contrast to liberal thinkers, who ground the concept of citizenship on the individual and their inalienable rights, neoconservative scholarship prioritizes the community over the individual and thereby centers the concept of citizenship on the duties and responsibilities of individuals towards the community. Mead (1986) justifies social obligations on two separate grounds. First, he argues that common duties generate a sense of equality in individuals that enhances an appreciation of community with others and hence strengthens social cohesion. Second, fulfilling certain duties legitimizes individual demands, therefore Mead posits a conditional relationship between individual rights and duties that determines one's membership in the political community. On the basis of such a conception of citizenship, he rejects the idea of welfare as an individual right. He argues that social rights make recipients dependent on welfare provisions, and in this way restrict their autonomy and compromise their citizenship.

Nevertheless, recent neoconservative scholarship diverges from Mead's rigid conditionality. Communitarian scholar, Etzioni (2011) accepts contemporary criticisms of the universal concept of 'the common good' by acknowledging its inherent particularism. Nevertheless, he maintains that it cannot be fully rejected, because it serves a number of crucial functions in society: it helps the individual to maintain a sense of identity, which is essential for human wellbeing; and serves as a force that legitimizes social norms, institutions, and control. Upon these terms Etzioni defines the good citizen as someone who accepts basic responsibilities towards 'the common good of the nation' and otherwise follows their individual preferences. However, for Etzioni this is not a strictly conditional arrangement; rather, he argues for a balanced relationship between rights and responsibilities. In his moral framework, individuals are not endowed with rights *for* pursuing certain responsibilities but 'by the mere fact of their humanity, as ends in themselves' (Etzioni in Gilbert, 2002: xv). He argues that 'one and all deserve a basic minimum standard of living' (xiv), and therefore the right to such basic necessities of life as shelter, clothing, food, and elementary health care should be detached from any public responsibilities.

Another approach in the neoconservative line of thinking is that based on the principle of *substantive reciprocity*; that is, the rule of proportional shares and dues. White (2003) argues that a lack of reciprocity is harmful to society: it harms the self-esteem of the individual who would not feel worthy if viewed as not contributing to the community. Furthermore, non-reciprocation creates a 'parasitic' arrangement in which some can free-ride while others contribute, which, in the long run, disrupts social cohesion, destabilizes institutions and therefore leads to alienation. Consequently, there may be a link between social rights and responsibilities, but this link must be based on a certain conception of fairness. White elaborates in detail the standards for civic obligations, the terms on which citizens may be required to fulfil them, and a minimum of the basic commitments of justice that together set up an arrangement of 'democratic mutual regard'. In this framework, contributory obligations are proportional to citizens' abilities and their procedural rights, and certain attributes of fairness must be assured *before* such obligations are required.

In terms of welfare, the principle of justice as fair reciprocity implies generous but work-tested provisions once a threshold of fairness is met which secures meaningful work opportunities and the elimination of brute luck poverty and economic vulnerability. That is, although White lays great emphasis on the individual's contributory obligations towards the community, in his concept of 'the civic minimum' a basic level of social rights is inherently incorporated. Hence, in his concept, a certain level of welfare provision is intrinsic and necessary to citizenship just as in the idealist and liberal views, and only beyond this minimum does the principle of substantive reciprocity start to operate.

Correspondingly, some liberal theorists do accentuate community values while arguing for the primacy of individual rights. Jordan (1996), for instance, explicitly argues that contemporary welfare societies need to find ways to reconcile individual autonomy and community interests. He demonstrates that in welfare capitalist societies communities are based on market exchange and in such proprietary communities new dynamics of social exclusion have emerged: powerful interest groups of mainstream citizens are confronted with powerless excluded people. In these dynamics, Jordan argues, welfare plays a key role as a means of intrusion and enforcement. To counter this social bifurcation, harmful for both the individual and the community, Jordan proposes a move towards educative and supportive social policies that detach distribution from production and provide every individual with the opportunity of participation. Such an arrangement, he argues, is conducive to counter-exclusive collective actions suited to diverse consumption-oriented sovereign individuals in a global environment of scarce and unequally distributed resources.

Nevertheless, neoconservative theories prioritize the thriving of the community over individual flourishing, and therefore in their conceptualization welfare provision is primarily a means of social cohesion rather than a tool of strengthening democratic subjectivities. Consequently, neoconservative arguments still highlight the obligations of citizens, paid work in particular, rather than their individual rights as the means of enhancing a sense of community. As a result, in this framework, welfare institutions are imagined to serve the common good only to a limited extent and primarily in a conditional, give-and-take arrangement; otherwise they are still regarded detrimental to citizenship for eroding people's sense of equality and community membership.

Moreover, it is also contentious to draw such a pronounced dividing line between the thriving of the community and that of the individual, as neoconservative thinkers do. When the focus is on citizenship, the individual is necessarily identified in relation to the community, and vice versa; the flourishing community that neoconservative scholars and publicists desire entails democratic subjects – that is, individuals capable of exercising their powers as citizens and hence shaping the political community they are part of. And this, I argue, necessitates rights and capabilities beyond the very minimum that neoconservative thinkers assume, such as separate minority rights, respect for civil liberties, prevention from discrimination, and conditional welfare provision.

It is also arguable that the neoconservative approach is based on a very limited conception of contribution. As demonstrated above, when it comes to civic responsibilities, neoconservative theories primarily focus on paid employment obligations and in this way fail to take account of a plethora of unrecognized contributions fulfilled by the less powerful, such as running households, performing a wide range of care work (done predominantly by women, and poor minority women in particular) or grassroots advocacy (often performed by marginalized people).

Furthermore, both liberal and neoconservative scholars overlook the broader socio-political setting in which they theorize welfare rights and civic obligations. It is highly controversial to argue for generous but work-tested provisions following the elimination of brute luck poverty and economic vulnerability and after meaningful work has been provided in an era when the global economy is built on brute luck, poverty and economic vulnerability and the lack of meaningful work opportunities for a broad social strata (Gilmore, 2007; Harvey, 2007; Piven, 2012).

An ever-broadening stream of scholarship studies the operation of welfare institutions in relation to the political economy of neoliberalism, and argues that Western societies have been undergoing the neoliberalization of welfare policies since the late 1970s. At an early stage of this process, Gough (1979) pointed out that public welfare provision had increasingly been restructured as a means of legitimizing the hegemonic economic order and related class relations. By now, a robust body of literature has demonstrated that ‘welfare programs for the poor continue to operate [...] as derivative institutions shaped by pressures that arise from the polity and market’, and as a result, neoliberal paternalism has become the predominant mode of poverty governance (Soss et al., 2011) and a business model of welfare provision has been increasingly dominant in these societies (Piven, 2012). Consequently, embedded in neoliberal political and economic structures, welfare institutions are increasingly focused on surveillance and discipline (Piven and Cloward, 1972; Schram and Silverman, 2012) and tend to merge the functions of restrictive and stigmatized workfare and expansive ‘prisonfare’ programs (Wacquant, 2009), therefore resulting in the criminalization of poverty (Gustafson, 2011) through ‘the penal welfare complex’ (Brin Hyatt, 2011).

For these reasons, it is important that we analyze the relationship between welfare provisions and citizenship in a framework that takes into account the broader political and economic environment in which this relationship materializes, as well as the breadth and complexity of the structure of both welfare provisions and citizenship.

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For such an analysis, I propose a conceptual framework that studies the functions of welfare institutions as a means of citizenship socialization.

### *Welfare as an Instrument of Citizenship Socialization*

Explicitly or implicitly, welfare institutions serve a range of functions: they tackle poverty, provide social security, enhance social justice, induce social reproduction and stratification, or exert social control, to name but a few (Deacon, 2002; Pierson, 2006; Alcock, 2011; Daly, 2011). From the 1970s onwards a growing stream of literature has focused on the disciplinary functions of welfare institutions. Piven and Cloward (1972) investigated the functions of public welfare in the US through a historical analysis of welfare reforms and identified a cycle that starts with economic change or a market downturn that leads to the dislocation and marginalization of people in the lower echelons of the social hierarchy. This, beyond causing human suffering, poses a risk of social unrest, instability, and disintegration that enforces the government to expand relief. However, as unrest is pacified, cuts in relief follow in terms of level, coverage, as well as conditionality, masked as welfare reform. Such 'reforms', Piven and Cloward argue, above all serve for the regulation of poor people. That is, they are functional in preventing unrest, regulating and enforcing labor and transforming recipients' behavior. In this way, they shape the polity as a whole, as well as individual citizens.

Examining government policies through the functioning of 'street-level bureaucrats' Lipsky (1980) demonstrates that government institutions, including welfare, serve a number of functions beyond redistributing state resources. They exercise control, confer status and also mediate the relationship between the state and the citizen, and in this way, Lipsky highlights, have a significant impact on participants' citizenship. He points out a number of features of the functioning of street-level bureaucrats that ultimately constrain and control clients and compromise certain aspects of their citizenship, such as discretion, work pressure, ordering, classification or alienation. Some of these attributes are functional components of the system (such as discretion or work pressure), while others are a result of the tension between bureaucrats' drive to do good and the impossibility of realizing their goals under the given circumstances (e.g. relying on stereotypes or blaming victims).

This stream of literature powerfully demonstrates that certain aspects of the functioning of contemporary welfare regimes - such as shaming, discretion, infantilization, relying on stereotypes or work pressure - rather than reinforcing clients' citizenship, in fact undermine their democratic subjectivity (Lipsky, 1980; Haney, 2002; Kumlin, 2002; Dubois, 2010). On the surface, these authors seem to agree with neoconservative scholars in concluding that receiving welfare provisions potentially compromises citizenship; however, there is a significant difference in their argument. While neoconservatives blame the very principle of unconditional, universal welfare for causing dependency and in this way damaging recipients' self-respect and eroding their sense of community and membership, the above authors argue that it is particular elements of existing welfare regimes (especially their conditional, non-universal features) that compromise recipients' democratic subjectivity.

On the basis of this more comprehensive conception of the functions of welfare provision, a new approach has emerged in the scholarship of welfare institutions that links welfare provision and citizenship directly, on the instrumental level, as opposed to the above, more abstract, normative conceptions. This scholarship investigates a less explicit function of welfare provision; namely, the ways in which welfare institutions socialize individuals (claimants, recipients and the broader society) into being citizens, and in this way also shape the qualities of democracy (Szalai, 2008).

*Just institutions matter.* The catchy title of Rothstein's (1998) main work is also the essence of his argument that beyond serving their central, de facto functions, social institutions also have a significant influence on social norms and the role they play in society. Following the logic that social space and symbolic power organize the social in a dialectical manner (Bourdieu, 1989), Rothstein demonstrates that there is an iterative relationship between the institutional setting of society and the social norms prevailing therein. The actual functioning of institutions and their discursive frame determine what the driving logic of society is (e.g. moral principles or economic reasoning), and shape the resulting social norms (i.e. people's cognitive map of what others are and would do in a given situation, and what they consider good, just or fair). In other words, just institutions matter not only in the sense that they bring about just outcomes, but also because they inform social norms and in this way shape the foundations of society. Moreover, since in a social setting, norms are internalized by individuals, the shape and functioning of institutions inevitably shape citizens, too. As Rothstein put it: just (in his Rawlsian conception, democratic) institutions create democratic citizens interested in justice. Consequently,

'[w]elfare states reflect political struggle, but they also guide subsequent political struggle. Thus, welfare states contribute to the formation of citizens' interests and ideologies in the maintenance or expansion of welfare state programs. Through these interests and ideologies, societies collectivize and socialize the responsibility of averting poverty for their citizens.' (Brady, 2009: p.73)

Therefore, when examining welfare regimes an emerging body of literature argues for shifting the focus from individual virtue, equality or self-realization to democratic citizenship, and developing a democratic perspective of the welfare state (Gutmann, 1988; Moon, 1988). This scholarship maintains that an institutional system of universal welfare provisions that guarantees procedural and distributive justice, together with a certain level of social protection, strengthens individuals' democratic subjectivity. By alleviating poverty and inequality and thus eliminating severe individual hardship and social instability, while not harming people's self-respect, such an institutional arrangement effectively promotes democratic society.

In more concrete terms, Fullinwider (1988) identifies a dual relationship between welfare provision and citizenship. He argues that, although it is highly contestable on both instrumental and moral grounds, in contemporary welfare states citizenship is a necessary precondition of receiving welfare provisions. On the other hand, citizenship is not only a legal-administrative status, but also a 'set of habits and attitudes on which the delivery and receipt of welfare services have tutelary effects, either supporting or undermining good habits and attitudes' (261). That is, welfare

provisions *teach recipients lessons in citizenship*. First, they make recipients self-supportive and in this way enable them to pursue their ends, which is necessary for developing their self-perception as citizens. Secondly, using common institutions with other members of society has an instrumental as well as an intrinsic value, which also informs recipients about their membership and their status in society; that is, their citizenship.

The logic of welfare provisions teaching lessons of citizenship has a lot in common with Mead's 'civic conception of welfare'. Mead cites conservative members of the US Congress of his time, who argue that only a system of welfare provisions that promotes self-reliance can facilitate recipients' 'developing into citizens' by enhancing their self-respect as equal, contributory members of society. However, as opposed to Gutmann, Moon, Fullinwider, or Jordan, who highlight universality and social security as key components of a welfare system conducive to democratic subjectivity, Mead and the discourses he builds on maintain that citizens are 'thoroughly schooled in their obligations' (229): consequently, duties (work requirements in particular) are necessary components of a welfare arrangement that produces citizens.

The above are theoretical arguments about the possible or desirable educative effects of welfare institutions on citizenship; however, there is also empirical evidence to support these arguments. In Sweden, a large-scale postal survey examined the impact of the institutional design of the welfare system on recipients' experience of justice, their political preferences (their support for the democratic political system and incumbent politicians) and their endorsement of state interventions (in the form of their support for the welfare state) (Kumlin, 2002). This research distinguishes three types of welfare systems on the basis of the degree of discretion of welfare institutions and the range of realistic exit options they offer to recipients: consumer (empowering), user (neutral) and client (disempowering) systems. The results clearly demonstrate that the institutional setting of the Swedish welfare state has a significant effect on each examined variable: experiences of distributive justice and voice opportunities have the most significant impact on political trust, while those who have personally experienced injustice were less likely to be satisfied with the democratic system and to trust politicians than other participants. On the other hand, the data shows that when opportunities to exert influence were poor, welfare state experiences had negative effects on political trust, no matter how satisfactory the services were. That is,

'voice opportunities seem to be more than mere instruments for improving personal outcomes. This finding tells us not just that people care about voice opportunities, but also something about why they care. Judging from the results, voice opportunities are not just an instrument for achieving accurate service delivery. Rather, they seem to be important in themselves.' (271)

In this way, confirming the above theoretical accounts, empirical evidence demonstrates that welfare institutions have broad political relevance for democratic subjectivity – the experiences they generate shape citizens and also have a feedback effect on the broader democratic institutional system.

Clearly resonating with these findings, empirical data collected in the US highlights further lines of reasoning why the welfare complex cannot be considered a mere technical apparatus, but a core political institution (Soss, 1999; 2002). First of all, welfare claiming is based on citizens' needs (that are inherently social, as discussed above) and these needs are directed at government personnel and institutions. Second, it affects public resources and their redistribution, therefore it is an agent of political stratification. Furthermore, it is an act and a relationship embedded in legal regulations. And fourth, claiming welfare provisions often entails some form of state surveillance over claimants and recipients that also politicizes these provisions.

Moreover, this piece of research not only demonstrates the various ways in which welfare institutions are a key domain of political action, but also shows that receipt of welfare provisions has a significant impact on recipients' actual incorporation in the polity. It affects their (broadly conceived) political activities, their self-perception as citizens, as well as their sense of political efficacy; i.e., their view of how responsive the government is to their claims (Gilens, 2012).

That is, these findings demonstrate that

‘as clients participate in welfare programs they learn lessons about how citizens and governments relate, and these lessons have political consequences beyond the domain of welfare agencies. [They] become the basis for broader orientations toward government and political action.’ (Soss, 1999: 364)

In addition to this stream of scholarship, an emerging body of empirical research, predominantly conducted in the US, demonstrates that certain types of welfare provision have evident demobilizing effects on recipients. The pioneering study of Verba et al. (1995) demonstrated that in the US there is a significant difference between the broadly conceived political activities of recipients of means-tested and non-tested benefits, even when controlling for other potential causes. While 18 per cent of the former were engaged in at least one political activity at the time of the research, the proportion was as high as 44 per cent in case of the latter. Furthermore, unlike social insurance recipients, clients of public assistance were underrepresented in every political activity measured by the researchers.

Other studies found a clear difference between the effects of universal and means-tested programs on recipients' voting behavior. First, empirical evidence shows that the greater the number of universal programs citizens have used, the greater the likelihood they vote, whereas the use of means-tested programs results in a decrease in recipients' inclination to vote (Mettler and Stonecash, 2008). In addition, empirical data also demonstrate that participants in social security programs are significantly more likely to vote than those in the means-tested, discretionary and highly stigmatized AFDC (Aid to Families with Dependent Children) scheme. Moreover, the sense of external political efficacy of social security recipients was significantly stronger than that of AFDC beneficiaries (Soss, 1999), and the TANF (Temporary Assistance for Needy Families) program, the successor to the AFDC scheme, was found to have substantial negative effects on the rates of civic and political engagement of people living in poverty (Bruch et al., 2010).

Mettler and Stonecash explain this palpable difference by pointing to the messages that recipients, as well as broader society, get from the different programs. They argue that privileged, middle-class individuals get the message from policies that target them (such as pension schemes or veteran benefits) that they are valued citizens, and therefore they are more likely to form a view of politics as a fair and open game overall. On the other hand, recipients' sense of political efficacy is impaired by the design of means-tested programs.

And Mettler (2010) demonstrates how such messages are conveyed in practice. Her research found that the majority of those who benefit from government programs (e.g. pension schemes) do not even know that they enjoy government support; whereas for those who receive social assistance it is always made very clear, and they are reminded time and again that they are receiving state support. Moreover, this fact is often made very visible by recipients employed in public spaces (as a precondition of the aid they receive), who often have to wear high visibility vests (Piven, 2012). In this way the broader public is also informed about the given individuals being subject to welfare support. In addition, empirical research also identified particular components of policies (e.g. clinical reasoning, or discourses of (un)deservingness) that often send disempowering messages to the target population (Ingram and Rathgeb-Smith, 1993).

Furthermore, Campbell (2003) provides a complex empirical analysis of the differences *across* welfare programs in the US in relation to what she calls the participation-policy cycle. She comes to the conclusion that

‘[l]ike Social Security, veterans’ benefits confer resources that enhance participation, foster interest in public affairs, endow recipients with a political relevance that invites mobilization by interest groups and parties, and enhance recipient feelings of government responsiveness. These program recipients participate at higher levels than they would in the absence of the programs. Welfare recipients, by contrast, participate at even lower levels than their already modest participatory capacities would predict, largely because of the disengaging aspects of program design that relegate them to a lower tier of democratic citizenship.’ (19)

In a meta study, Mettler and Soss (2004) provide a synthesis of such findings and identify a number of ways in which public policies reinforce or undermine civic capacities. First, resources extended by policies provide material incentives for political participation. In addition, policies can also play a role in building and distributing civic skills within the citizenry, just as they can supply resources for political mobilization. Furthermore, policy designs shape citizens’ personal experiences with and evaluation of the government and thus influence their patterns of political belief and their processes of political learning. This study also highlights that more recent studies found so-called interface effects that shape citizens’ encounters with government – for example, clients of AFDC in the US formed particularly negative impressions about government. In addition, policies can also frame the meaning and origin of social problems, therefore they convey messages about the underlying nature of the problem and in this way shape citizens’ perspective of issues.

In certain cases, policies have the potential to affect the publicly perceived importance of an issue and possible reactions to it and in this way shape policy agendas. Furthermore, certain policies directly structure political participation, such as those concerning incarceration or ID regulations. Last but not least, the report also found that policies influence the ways in which individuals understand their rights and responsibilities as members of the political community. Consequently, Mettler and Soss were able to identify policies that explicitly encourage or discourage demand-making and therefore lead to over-extension or underutilization of the given policy. (For example, while the Earned Income Tax Credit actively encourages take-up, the TANF program is designed to divert and deter claimants.)

This body of evidence has significant implications. Such political inequalities deplete not only procedural fairness, but also substantive justice. Moreover, by challenging the equal worth of citizens as members of the community, capable of having a conception of the common good, and controlling their own lives through influencing collective decisions (Verba, 2003), they also have corrosive effects on democracy.

In other words,

‘elements of policy design send messages about citizenship to target groups. Different target populations of policies receive quite different signals about their status, what sort of game politics is, and how people like themselves are to be treated by government.’ (Ingram and Rathgeb-Smith, 1993: p. 16)

Therefore, this body of scholarship makes a case for the refocusing of welfare policy analysis on citizenship and democracy. The welfare institutional complex is a domain of learning citizenship and a site of developing political subjectivities so it should be studied as an independent variable when political mobilization and participation are investigated.

### *Central and Eastern European Implications*

The above analysis highlights that scholarly interest in the role of welfare institutions in beneficiaries’ citizenship socialization has been manifested primarily in the US context so far, and European scholarship seems to be lagging behind in this respect. However, it is important to analyze these processes in the European context due to the deep-rooted, although increasingly fluid, differences between European welfare regimes and the US. Due to its historical specificities and particular socio-geographic, state and party structures, the US is considered a laggard in the mainstream welfare state literature in terms of the development of welfare policies and institutions (Dobbin, 2002). Nevertheless, as a result of the above-mentioned trends involving the restructuring of welfare policies in the neoliberal political economy, the once sharp distinction between welfare policies in the US and in the core European welfare regimes has become increasingly blurred.

Haggard and Kaufman (2009) point out that studying post-transition CEE (Central and Eastern European) welfare institutions is not only a particular focus of scholarship, but also ‘promises to deepen our understanding of the more general

*political* processes of redistribution, insurance and service provision' (236). Based on this claim I argue that undergoing the formation of democratic citizenship at the same time as the establishment (or reformation) of welfare policies in the course of the transition, in an era when both democratic and welfare institutions are facing historical challenges globally, makes CEE welfare regimes crucial terrain for examining the interplay among the different layers of citizenship and studying the ways in which the everyday instruments of social citizenship inform individuals' civil and political citizenship.

Theoretical as well as empirical scholarship has powerfully demonstrated that welfare institutions played a pivotal role in the political strategies of CEE state-party regimes. In the first phase of regime development, social policies served economic purposes, and thus were functional in shaping and stabilizing the new system; while in a second mature or declining phase, the expansion of quasi-universal welfare provisions played a crucial role in maintaining social support for the system in spite of many destabilizing factors (Szalai, 1997; Szikra and Tomka, 2009; Tamás, 2010).

During and after the transition, welfare institutions maintained their crucial, although significantly altered, political functions. First and foremost, newly created welfare institutions were used to 'divide and pacify' the different layers of affected societies (Vanhuysse, 2006). Relatively stable provisions were offered to a wide stratum of the middle classes, but only meagre, residual social assistance for people in marginal social positions. By establishing different tiers in the welfare system, governing elites designated the 'deserving' and 'undeserving' groups in these societies, rewarding the former and punishing the latter (Ferge, 1997; Szalai, 2007; Rat, 2009). In this way, the political elite managed to contain discontent and prevent destabilization. By analyzing protest behavior in the Czech Republic, Hungary and Poland, Vanhuysse (2006; 2009) found that the segmentation of the labor force using welfare provisions prevented political alliances being created between different sections of society and therefore quietened the middle classes and older people, or at least channeled their grievances into more peaceful means. In this way political stability was secured despite increasing economic hardship, and hence the new political and economic systems of post-transition CEE societies were consolidated, at least for the time being.

Szalai (2007) compellingly demonstrates the ways in which the gradual refinement of a dual system of generous contribution-based provisions for middle-class employees and pensioners with strong social rights on the one hand, and extremely meagre, means-tested social assistance provision with high levels of discretion for disadvantaged social groups (such as the long-term unemployed or the unemployable) on the other, was established in the Hungarian context. This dual system promoted a strong and stable middle class supportive of the new regime and in this way served the function of maintaining social peace and securing the economic functioning of the regime (for instance, state pension funds served as an important fiscal asset in these countries). An important element of this class-making and economic stabilizing by welfare institutions was the employment of less educated middle-class Hungarians, mostly women, who had difficulty finding jobs in an increasingly competitive job market and thus were facing status insecurity. Thousands of these women became social workers, social assistants, or administrators of

municipality welfare offices, family or job centers, and in this way managed to maintain their middle-class status, albeit at a fairly low level (their income is still very low and their work does not receive much social recognition). On the other hand, for an increasing segment of the population in these societies, and especially for the Roma minority, the newly introduced welfare policies had disempowering consequences, such as increasing control, humiliation and stigmatization, and containing mobility-related, disciplinary and restrictive workfare measures (Szalai, 2007; Rat, 2009).

Third, the dualization of welfare provisions (Emmenegger et al., 2012) was also functional in securing the labor flexibility that the neoliberal political economy increasingly required. For example, in post-transition Hungary the system of social assistance successfully controlled and regulated the most vulnerable sections of the population, such as people facing long-term unemployment, by providing meagre benefits coupled with strict conditionality (most importantly, tough workfare conditions) and in this way ensured that they took whatever jobs they could find or needed to be done, under any terms and conditions (Szalai, 2007). Therefore, the post-transition welfare regime in Hungary established a conditional relationship between the social and civic layers of citizenship, reflecting mainstream neoconservative conceptions of the interrelationship between welfare and citizenship.

Last, together with the transforming political economy, the social conception of need was also recast in the emerging Hungarian democracy, resulting in shifting definitions of 'the needy', with a focus on their material contributions, or rather the supposed lack thereof. Research shows that the system of welfare policies was adapted to these shifts, and as a consequence, the overall conception of social assistance and the populations associated with it became increasingly stigmatized and pathologized in post-transition Hungary (Haney, 2002).

In 2013, I conducted institutional ethnographic research in northeast Hungary that explored recipients' experiences of the various elements of the social assistance subsystem of the contemporary Hungarian welfare complex and investigated the influence that each had on recipients' civil and political citizenship. In other words, I investigated what the beneficiaries had learned about their democratic subjectivity from their experiences of receiving social assistance (Dósa, 2016).

First of all, my research found that most recipients laid much greater emphasis on the duties than on the rights attached to citizenship, which clearly reflects the neoconservative conception of social rights in the contemporary Hungarian welfare regime, as demonstrated above. In addition, many recipients made a direct link between democratic subjectivity and social security. That is, they indicated that a certain level of social rights was a prerequisite of a truly democratic political establishment and the ability to be an active member thereof. However, most of the recipients who conceived of citizenship in substantive - in contrast to neutral, administrative - terms felt that their citizenship was compromised in reality. My study showed that undemocratic, disempowering institutional characteristics and practices had a diminishing effect on recipients' willingness and capability to actively exercise the civil and/or political aspects of their citizenship.

The most important of these characteristics and practices my research found were, first, recipients' lack of information about the rules of assistance provision and

their rights in relation to it. Second, the lack of material resources resulting from the extremely meagre benefits which constrained recipients' democratic subjectivity in very practical ways (such as their not being able to make phone calls, use public transport, or initiate costly legal remedy procedures at the court level), and also impaired their sense of political efficacy in many cases. Third, the shame induced by the derogatory treatment recipients experienced at welfare offices, the institutional violations of their privacy, and popular degrading discourses about benefit receipt. Last, recipients' acute feelings of vulnerability vis-à-vis both staff in the welfare office and politicians in general as a result of the futile administrative cycles they felt trapped in, their absolute lack of control over their benefits, and the authority's high level of discretion in providing these.

To conclude, I argue for a diversion from mainstream conceptualizations of the interrelationship between welfare and citizenship in favor of an alternative perspective that views welfare as an agent of reproducing democratic subjectivities. That is, as a core political instrument, rather than a mere technical implement of social policies. This shift is helpful not only for understanding the complex relationship between social, civil, and political layers of citizenship and the role of welfare policies in reproducing contemporary political inequalities, but also for identifying those actual characteristics of welfare provision that support and those that undermine democratic citizenship. In this way this approach and further research based on it have crucial policy implications.

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