

# The future of the welfare state: paths of social policy innovation between constraints and opportunities

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«The sun and the clouds»:

Meaning, potential and limits of the primary solidarity in Portugal  
in the context of Southern European welfare systems

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## **Abstract**

One of the key elements of the widely recognized distinctive character of the Southern European welfare systems is related to its specific institutional welfare arrangement, namely the role of voluntary sector and family as welfare providers. In this point of view, Southern European families play a meaningful welfare role and the informal support networks of families compensate an important part of the public welfare gaps. Although the recognition of the relevance of the social capital based on the primary solidarity as “watermark” of the South Europe countries, other perspectives underlying the need to elucidate the characteristics and limitations of informal support networks.

The purpose of this paper is to analyse the meaning, potential and limits of the primary solidarity in Portugal in the context of Southern European welfare system.

Theoretical and empirical bases of this paper are the debates on welfare regimes, with particular attention to the Southern European welfare state discussion, the empirical studies on family dynamics and networks in Portugal and the European and international organisations statistical information.

**Key words:** primary solidarity, family solidarity, informal support networks, Portugal, Southern European welfare systems.

## Introduction

This paper is divided in three parts. In the first part, taking into account the debate on welfare regimes we dedicate special attention to the particularities of the Southern European Welfare State. In the second part we analyse the debate on informal solidarity in Portugal putting into evidence its potential and limits. Finally we explore some perspectives to innovate the social policies in Portugal in order to, at the same time, compensate the limits and to reinforce the potentialities of the informal and family solidarity.

Explicit or implicitly there is a central idea in this article: the informal and familial solidarity are an important characteristic of Southern European countries, and the intrinsic limits and the impact of the more recent societal transformations on this form of social capital, need to be considered in a deep articulation with the enlargement and innovation of the public social policies.

## The worlds of welfare state and the particularities of the Social State in the Southern European countries

As Ferrera (1996) remarks, the study of the *welfare state* of the Southern Europe was neglected by the academic debate. None of the more significant researches on this subject realised in the eighties, included Spain, Portugal and Greece. The explanation for this fact will be, as referred by Martin (1997), in the major part of the cases, in the supposition that the social policy measures adopted in the Southern European countries was similar to the schemes yet adopted in the north and centre of Europe, but with a more elemental level of implementation. Or, in other words, as Rhodes (1997) emphasises, these countries have been seen as undeveloped systems, but in the same trajectory of institutional development to the rest of them.

In contrast, in the recent years, we can observe the publication of a significant number of comparative works and studies on Southern European countries<sup>1</sup>. The argumentation presented in these publications goes through two different approaches: in one way supporting the idea of the proximity between the *welfare state* of the Southern Europe and the models of the rest of the countries, and in other perspective arguing on the specificity of the Southern countries based on peculiarities of this welfare system.

The first perspective presents the *welfare state* of the Southern European countries as a variant, or sub-type, of the conservative/corporatist/catholic model presented by Esping-Andersen (1990). Castles (1995), for example, developing an analysis based on social transfers, considers the Southern countries as fragile members of the conservative family of nations. Katrougalos, based on the Greek case, denies the utility of the Southern European Welfare State model. For that author, the distinction of this group of countries isn't based in «any institutional or organisational specific trait but reflects the delay in the construction of the *welfare state*, and more generally, the

relative economic underdevelopment of the Mediterranean South»(Katrougalos, 1996: 43, quoted by Rhodes, 1997: 3). In this point of view, the essence of the *welfare state*, in these countries, consists in their foundations and not in their institutions and organisations that have been building concrete and specifically.

The second perspective considers that the dilution of the South countries in the *conservative family* limits considerably the understanding of the organisation, functioning and social consequences of the *welfare state* in the countries of South Europe. Pereirinha (1997 a, b), relatively to the emphasis of Esping-Andersen on the decommodification of the social rights of the people integrated in the labour market, underlines two important limits of the pertinence of his model to the South Europe countries. On the one hand, there is an exclusion of the informal labour market analysis, which represents an important role in the South. In the other hand, the mechanisms of social solidarity into the civil society of the South Europe and of the informal institutions, which are an important part of the fighting against the poverty and social exclusion, are, in a similar way, neglected. Thus, Pereirinha supports a conceptualisation of the *welfare state* not only exclusively based on the relationship between state and market, but that involves the role of the civil society and differentiates the families and the voluntary sector.

In a similar perspective, Claude Martin (1997) puts special emphasis in the continuity of the centrality of the family in the South Europe countries. For this author, the specific type of combination that exists in the *welfare society* (neighbourhood, family and kinship) and its relationship with the State (the nexus family-State) contains relevant elements to the understanding of the reality of the *welfare state*.

In other angle of analysis, Ferrera (1996) focus specially the particular institutional character of *welfare state* of the South Europe countries. According this author, the *socio-political culture* that inspire the functioning of the *welfare state* of the South is very different of the corporatist and catholic countries of the North. In this line of argumentation, supported equally for others authors of the South of Europe, as Venieres (1997) and Symeonidou (1997), the differences between the Continental and Southern systems can partially explained by the underdevelopment, but the socio-political organisation of these societies has conducted that when and were the development has occurred has been seriously distorted in favour of the privileged groups, originating the *syndrome* of the *welfare* of South (Ferrera, 1996: 5-6).

This line of analysis gives particular attention to the institutional arrangements of the different actors in the context of the designated *welfare triangle* (state, market and civil society in its formal and informal modalities) and is presented as having more sensibility, facing the transformations observed on the architecture of the *welfare states* in direction to the *welfare mix*, and the differentiation in the civil society, between families and voluntary sector, as remarks namely Pereirinha (1997 a, b)<sup>2</sup>. Is this analytical perspective that interest us particularly in this article by its heuristics potentialities to understand the particular character of the South Europe countries <sup>3</sup>.

*State and families in the South Europe countries*

In the truth, the majority of the works that, in recent years, have come to be developed on welfare state in the countries of the South Europe emphasises as one of the peculiar trait of these countries its model of family. The comparison of some demographic and socio-economic indicators, between of South countries and the other European countries (cf. Table 1), evidences effectively specific characteristic of the structures and familiar behaviors.

Martin (1997) argues, based on a revision of different comparative studies on the family in the Europe, that, even so if have operated in the last few decades cultural and socio-economics changes that reduce the disparities between the types of European families, it doesn't observe a process of convergence at one time that irreducible specificities between the countries of the North and the South of the Europe persist <sup>4</sup> (Martin, 1997:29).

**Table 1: Demographic and socio-economic indicators of the South Europe countries**

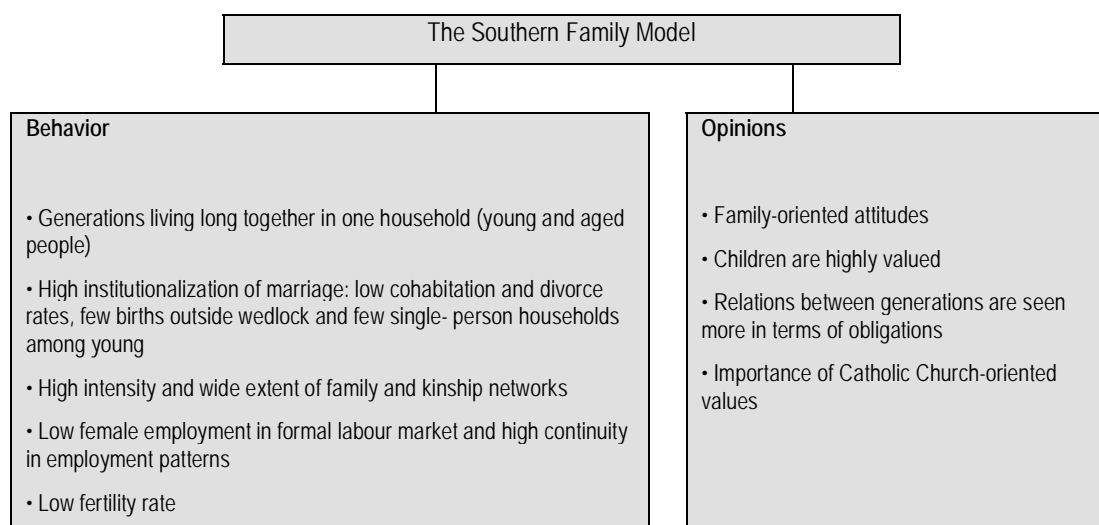
	Family Indicators										
	Fertility Rate			% Youth people living with your parents (20-24)			% Youth people living with your parents (25-29)			Households average size	
	1965	1995	2005	1987	1996	2002	1987	1996	2002	1996	2002
Portugal	2,95	1,41	1,40	84	90	79,0	49	62	52,6	3,14	2,9
Greece	2,25	1,31	1,33	63	73	73,4	39	50	61,5	2,93	2,6
Italy	2,66	1,19	1,31	81	89	88,4	39	59	63,0	3,01	2,6
Spain	3,15	1,17	1,35	84	90	85,2	39	52	59,6	3,01	3,0
UE	2,54	1,43 a)	1,48 b)	-	66	-	-	32	-	2,77	2,4

Source: Eurostat Yearbooks

Notes: a) UE25 - 1990/2000; b) UE25 - 2000/2005

In this same orientation, Guerrero and Naldini (1997), in a comparative study on the family in Italy and Spain, analyze the importance of the family in the welfare, through the family networks, of the attitudes face to the religion and family duties. In this work, the authors support the idea of the existence of a model of family of the South (Figure 1) with a high level of support and solidarity in the family networks.

**Figure 1: The Southern Family Model**



Source: Guerrero e Naldini, 1997 – Figure 6

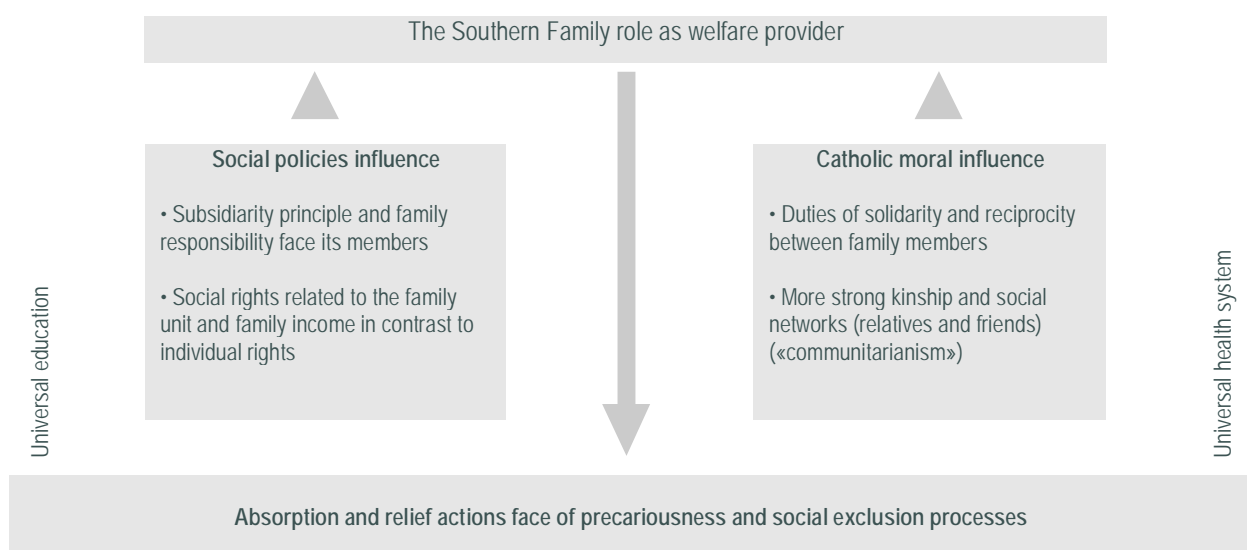
The relevant role played for the family in the South Europe in the production of the social welfare could be explained, besides the socio-economic factors, for the public policies oriented to the family and for the influence of the religious attitudes. The influence of the Catholic Church, in the production and reproduction of the family culture, relatively to solidarity and reciprocal duties between the members of the family, continues to be strong, in spite of the process of secularisation observed in the last few decades. Comparatively with the protestant ethics, more individualist, the catholic ethics is more *community-oriented* and give place to the existence of family networks more intense than in other countries of Christian religious culture. These, and other characteristics, foment the solidarity of the families and enable them to provide material and social support to the members of the family in difficulty or submitted of the social exclusion processes.

It is the importance, in the countries of the South Europe, of this informal solidarity, and other more formal modalities of *welfare-society* (third sector) as well, both with organic relationship with the state and the market that it is based on, according to some authors, the necessity of to consider and to theorise one fourth model of *welfare state* (Cf. Leibfried, 1990, Pereirinha, 1997, b).

#### *The family in the South Europe countries as mechanism of social regulation*

The role of the family in the social provision in the context of the South Europe welfare state systems is clearly relevant. As Laparra and Aguillar (1997) point out in the case of Spain, the family role is one of the essential elements to the absorption or reduction of the precariousness and social exclusion processes that affect the Spanish society, thus explaining the apparent contradiction between the high risks of social exclusion suggested by the simple social indicators (unemployment rate, relative poverty rate, etc) and the degree of social exclusion that can be observed directly and based on indirect indicators.

**Figure 2: Integrated Precariousness Model**



Source: elaboration based on (Laparra & Aguilar, 1997)

The family of the South Europe is thus the base of the integrated precariousness model (Laparra and Aguillar, 1997:91), converging this interpretative hypothesis with the thesis of Sposati and Rodrigues (1995) of that the welfare-society is, at the same time, the manifestation of cultural standards and a mechanism of social regulation.

One of the comparative advantages of the South Europe countries will be, in the light of the perspective that comes being considered, a bigger consistency of its zone of assistance<sup>5</sup>, as resultant from one stronger density of relational resources of the family network.

The other face of this question it is the principle of the subsidiarity associated with the catholic and conservative mark (Esping-Andersen, 1997:430-1), which assumes, in the countries of the South, an important meaning. As Kazepov (1999: 313-316) considers, in his analysis of the articulation between the function of subsidiarity carried out for the primary network of social support and the availability of institutional resources of support to the families, the countries of the South Europe are characterized for the fact of the primary networks of social support will play a *substitute role* of the measures of institutional support, a form of *passive subsidiarity* characterized by the overload of the families on social care and solidarity mainly supported in the resources of the reciprocity and with a low participation of the institutional resources (cf. Garcia and Kazepov, 2002: 130) <sup>6</sup>.

However, the capacity of the families, namely as substitutive social protection and emergency network face to the limits of the public protection, is strongly associated with its member's integration in the labour market and the social protection status as well. As Ferrera (1996) suggestively describes, the family of the South Europe, continues to play the role of «Clearinghouse» at the domestic scale, realising the management of the incomes and goods result of the different chances of economic integration and social protection transfers of its members<sup>7</sup>. Thus, and with majority of reason, in the current socio-economic situation, for each family of the South assumes a vital importance, that at least, one of its member's remains anchored in the stability zone of the labour market and income guarantee.

#### *The primary social support networks in the South Europe: social divisions and gender issues*

The analysis of the family networks as informal dimension of the «welfare-society», take into account its articulation with the State and the Market, requires that be considered, along with its potentialities, the limits and problems that its specific form of provision, based on the reciprocity, implies in welfare inequalities and exclusions (Arriscado Nunes, 1995).

In a first plan there is the risk of the social inequalities reinforcement as it has come to be underlined by some works in the area of the sociology of the family and the social policies (cf. namely Martin, 1995: 68 and ss.; Lesemann and Martin, 1995), that conclude for the significant inequality of the distribution of the social resources in terms of the families social and cultural status. But, it is equally important to take into account that, although the

familiar support to be regulated, in the Mediterranean countries, for the civil law, in contrast of what occurs in the majority of the European countries (Trefitelli, 1999: 53), it observes the existence of a part of the population completely unprotected. Therefore, as Laparra and Aguillar suggestively point out, «there is no way of granting a right to familiar solidarity» (1997: 91).

In one another plan, with a special meaning, there is a serious risk of disorganization of the feminine roles because takes place, in general terms, one very strong concentration of the caregiver role on the women, with clear repercussions on the citizenship of the woman (Taylor-Gooby, 1991), aspect who has come to be emphasised by the feminist perspective of analysis of the social policies, in the general plan of the debate on the typologies of welfare regimes (Lewis, 1992), as well in a focalised analysis of the South Europe countries (Trifiletti, 1999).

In this analytical perspective assumes a particular relevance the articulation between the gender conceptions adopted for the different societies and the social policies, considering the social protection policies and the way as they protect the social rights of the women, as well the family policy with respects to the *family cash benefits* and *social services* for the family, aspect that we will return.

The analytical perspective of welfare regimes that we have come to explore emphasises the necessity to consider, along with the categories consecrated for Esping-Andersen in the construction of his typology, other vectors namely the role of the family and the woman (gender dimension). But this analysis cannot be off of the systemic articulations between the role of the family networks support and of the women and the way as social protection policies in general and the family policy in particular promote the *de-commodification* (Esping-Andersen, 1990), and the *de-familiarisation* (Esping-Andersen, 1999), or, in a distinct perspective, support the subsidiarity (Kazepov, 1999). In this direction is important to consider, besides the aspects already underlined, some of the main characteristic of the social protection standards of the South Europe countries.

#### *The social protection system and the income guarantee in South Europe countries*

Ferrera (1996, 1997) <sup>8</sup> in one of the most excellent attempts to identify the common characteristics of the social policies in this family of nations, points out, namely, the following particularities:

- i. A dualist system income maintenance, in one hand with a generous protection to the core sectors of the labour force, and in other hand with a weak protection proportionate to the social groups situated in the irregular or not-institutional labour market;
- ii. A universalistic national health care system, constitutionally consecrated, despite the significant divergence between the legal denomination and its effectivity, persist important inequalities in access to the health care services and a significant presence of the private sector in the national health systems;

iii. A particularistic and clientelistic State where, in counterpoint with the weberian model of bureaucracy, occurs a manipulation of the social programs translated in political clientelism through the exchange of favors for political support.

In Table 2, the dualism of the income system maintenance can be verified by the analysis of the income substitution rate of the pensions (col.1), of other social contributory-based benefits (col. 2-4) in comparison with the guaranteed social minimum (non-contributory) (col.5).

Table 2: Benefits received as a % of average net earnings of manual worker manufacturing, 1990 <sup>9</sup>

	Pension	Sickness	Invalidity	Unemployment	Minimum Income
	1	2	3	4	5
Belgium	73	100	97	79	32
Denmark	60	73	83	73	34
Germany	77	100	39	63	29
France	88	53	46	80	30
Ireland	42	32	35	41	38
Luxembourg	78	100	65	85	36
Netherlands	49	70	49	74	41
United Kingdom	44	28	32	23	30
UE 12	<b>75</b>	<b>69</b>	<b>50</b>	<b>61</b>	<b>30</b>
Greece	107	100	36/9	28	10
Italy	89	31	56	26	16
Portugal	94	79	30	81	21
Spain	97	60	32	80	28

Source: CCE (1994: 53-66)

Notes:

<sup>1</sup> Contributory minimum pension (personal rate)

<sup>2</sup> Short-term sickness benefit (personal rate)

<sup>3</sup> Invalidity benefit (personal rate)

<sup>4</sup> First period unemployment benefit (single person)

<sup>5</sup> Old age guaranteed minimum income (in % GPD / inhabitant) (1992)

The weak protection guaranteed for the minimum pensions, contributory as well non-contributory, is particularly serious in the countries of the South Europe, because, in general, and specifically in the Portuguese case, the complete contributory records are in reduced number representing the minimum pensions the overwhelming majority <sup>10</sup>.

There also are other domains where equally occur a under protection of the citizens, namely in the case of unemployment in general and to the young first job seeker in particular, as well for the single parents.

It is this set, relatively homogeneous, of characteristics of the social protection systems that support the characterization of welfare state of the South Europe countries as a dualist system of income maintenance and/or guarantee. Thus:

*On the one hand we find in these countries a group of hyper-protected beneficiaries who are (or have been) included in the citadels of «garantismo»: typically public employees, white collar workers and private wage-earners*

*of medium and large enterprises working on a full contract, with job security (the «occupazione garantita»). These categories receive generous replacement benefits for short-term risks (sickness, maternity, temporary or partial unemployment, etc.) and very high earnings related pensions when they retire. On the other hand we find large numbers of under-protected workers and citizens, who only (occasionally) draw meager benefits and may thus find themselves in conditions of severe hardship: typically irregular workers in weak sectors without job security (small enterprises, traditional services and agriculture, etc.), workers of the informal economy, young and long-term unemployed people, etc . (Ferrera, 1996: 20).*

In this dimension of the citizen's social protection, the reality of the South Europe countries seems to insert itself, with particular characteristics and emphasis, in the tradition of the Continental Europe countries, based in the social insurance and the principle of the subsidiarity. As remarks Esping-Andersen (1997), this orientation has as implications that the social rights derive mainly from the labour market status and not of the citizenship status (as in the Nordic model) and the social protection tends to vary as the activity branches, reflecting the contributions, the status or the incomes, than more of social redistribution, and for this reason the particularistic interests overlap to the solidarity and the share of the social risks.

An essential difference between of South Europe countries and the rest of the Continental Europe countries is that, in these last ones, the social pressure in the direction of the universalism had given place, among others measures, to the concretisation of guaranteed minimum income schemes aiming to protect the citizens with incapacity to contribute for the social security and/or with precarious links with the labour market (Esping-Andersen, 1997:432 - 7). This situation however did not occur in the Mediterranean countries and therefore in these countries of the European Union there aren't national schemes of guarantee of incomes for the individuals and families with insufficient resources <sup>11</sup> and the social minimums are in general synonymous of poverty for the groups that depend on non contributory social benefits.

Thus, the systems of social security in the South Europe countries are not characterized basically, as an analysis of its genesis could suggest, for a limited and low standard bismarckian profile, as result of the stadium of development of their systems of social protection from occupational base. Their true peculiarity consist in a very double characteristic: on one hand the existence of selective schemes of high protection and in other hand the fragility and/or absence of schemes of basic universalistic protection.

These characteristics are highly relevant for the perspective adopted in this paper, because already it had been suggested is important to underline that the material resources on that these families count for the exercise of their support function, namely when confronted with the absence of stable work of some of their active members, depend, moreover other factors, of the standard of guaranteed income and of social services, thus exists a *circularity between the public mechanisms of social protection and the support capacity of the family*. As Laparra and Aguillar (1997) argued, for the Spanish case, the paper assured for the family is concomitant with the expansion of the subsystem of meaning-test social benefits, that, despite with a low standard, is essential to the attainment for the family of an acceptable level of familiar income (Laparra and Aguillar, 1997: 89) <sup>12</sup>, and to reach a precarious re-equilibrium.

### *Family policies and welfare regime in the South Europe countries*

The family policy assumes in the question of the primary solidarity networks a crucial importance. This exactly was remarked for Esping-Andersen when he recognized that the centrality of the family was the main weak point of his original model of the worlds of welfare capitalism (1999: 92). In his analysis on the nexus families - welfare regimes that he developed based on the operationalisation and measurement of the de-familiarisation operated for the public social policies, as well for the consideration of the direct role of the families in the social care provision, and also the action of the market, the Esping-Andersen conclusions are differentiated.

In the first analysis dimension (de-familiarisation through the state policies) the author considers to be in face of a bimodal situation that contrasts, on one hand, the Social Democratic regime and, in the other hand, the "Liberal", the "Continental" and the Mediterranean regimes. Underlining that the South Europe presents the lowest results in terms of public provision Esping-Andersen considers however that this circumstance by itself does not justify the consideration of a separate regime (cf. Table 3).

**Table 3: Welfare state services to families**

	Public spending on family services as a % of GDP (1992)	Public child-care coverage (%<3) (1980s)	Home-help coverage (% aged) (1995)
Denmark	1,98	48	22
Finland	1,53	22	24
Norway	1,31	12	16
Sweden	2,57	29	16
United Kingdom	0,48	2	9
Austria	0,25	2	3
Belgium	0,10	20	6
France	0,37	20	7
Germany	0,54	3	2
Netherlands	0,57	2	8
Italy	0,08	5	1
Greece			
Portugal	0,16	4	1
Spain	0,04	3	2
Scandinavian WR	1,85	27,75	19,5
Continental WR	0,37	9,4	5,2
Liberal WR	0,48	2,0	9,0
<b>Southern WR</b>	<b>0,09</b>	<b>4,0</b>	<b>1,3</b>
UE			

Source: Based on Esping-Andersen, 1999: Table 4A

Concerning the responsibilities and familiar work in terms of social care the analysis of Esping-Andersen (considering as indicators the percentage of aged people that cohabit with their descendants, the unemployed youth living with parents and the weekly unpaid women work) concludes relatively to the South Europe to be in face of the more familialist set of countries. However, arguing that the consistent consideration of a distinct

regime requires equally information relative to the role of the market in the de-familiarisation, but there are in this dimension reduced information in comparative terms.

In the perspective of Esping-Andersen the consideration of a specific regime of the South Europe does not pass in the test of the familialism. However its analysis presents limitations, because it is based on information relative only the one year of reference, as well the proper author recognizes, and categorical variables rather than of an analysis of the familialism as a continuous (1999: 94).

Looking for to surpass one of these limitations, Guo & Gilbert (2007) had essayed a similar analysis but in a longitudinal perspective having searching for the existence of steady standards in the time relatively to the public expenditure in family policy and thus to evaluate the relevance of the consideration of distinct welfare-regimes (cf. Table 4).

Table 4: Public expenditure on social policy as percentage of GDP <sup>13</sup> (mean and standard deviation)

	1980	1990	1992	2001
Social democratic regimes	2,62 (0,64)	3,46 (0,74)	4,00 (0,70)	3,23 (0,39)
Continental Europe	2,70 (0,37)	2,22 (0,52)	2,32 (0,56)	2,22 (0,73)
Liberal regimes	1,19 (0,64)	1,23 (0,66)	1,43 (0,81)	1,59 (1,00)
<b>Southern Europe</b>	<b>0,79 (0,31)</b>	<b>0,76 (0,38)</b>	<b>0,74 (0,30)</b>	<b>0,88 (0,34)</b>

Source: Guo & Gilbert (2007: Table 4) [from *The OCDE Social Expenditure database (1980-2001)*]

The main conclusion points out that the differentiation between regimes is accented between 1980 and 1990, verifying a significant distinction in de-familiarisation terms and that, since 1990, operates a trend inversion that puts in evidence a beginning of convergence between these families of countries (Guo & Gilbert, 2007:312). However, and according with the referred analysis, the comparison between Continental and South Europe regimes is significant in 1980 and 1990<sup>14</sup>, and although to verify a general trend of convergence we are in face of very distinct and much more homogeneous values in the cluster of the South Europe.

We are thus in face of results that following distinct methods, converge with the analysis already referred, on the forms of articulation between the resources based in the reciprocity and activated by the primary social support networks and the institutional resources (cf. Figure 3) (Kazepov, 1999, and Garcia and Kazepov, 2002).

Figure 3: Subsidiarity Models

Reciprocity networks role	Subsidiarity Models	Family social responsibilities	Institutional resources (benefits and services)	Regimes
Additional role	Not based in the subsidiarity	Low	High	Scandinavian countries
Complementary role	Active subsidiarity	High	Relevant	Continental Europe
Substitutive role	Passive subsidiarity	High	Reduced	South Europe

Source: Own elaboration based on (Kazepov, 1999; Garcia & Kazepov, 2002).

Thus, also in this plan, as it was underlined equally when we reported to the social protection in the South Europe countries, the specificity of the Mediterranean countries will not consist in to share with the Continental Europe countries the familialism in cultural bases, but in the peculiar model of passive subsidiarity that implies high levels of social responsibility of the families without significant support of the public policies.

Besides of the considered dimensions exist other relevant spheres where occurs one strong differentiation of the South Europe countries face to the rest of welfare state families. There is important to be mentioned the institutional dimensions and the political culture of the South that Ferrera (1996, 1997, 2000), Venieres (1997), Symeonidou (1997) and Santos (1987, 1990) had evidenced of absolutely clear form<sup>15</sup>. Esping-Andersen (1999: 90), devaluate the quality of the state apparatus, the political culture and institutional dynamics considering that such attributes will not allow to support by itself «the Mediterranean fourth world». Thus this author confirms one more time the limits of his macroscopic approach to catch the deep impact that these social and political mechanisms have in the real world of the citizens. Therefore if the nature of the of social security system is essential, less relevant is not the way as the administration of the social programs realize the management of the access to the social benefits, the rules of eligibility and the restrictions of the guarantee of the social rights.

### **Portuguese families as providers of social support: how strong they are today?**

Even thought the personal services for the elderly people have increased in all European countries, differentially with respect to the coverage of the different kind of specific services, the informal support, especially that is provided by the families, still representing of important role, playing the formal services a complementary and not substitutive rule (cf. Alber & Koller, 2004: 60).

In line with the members of the southern family nation, in Portugal, the families were and still are the most important provider of support and social care for dependent and elderly people, handicapped individuals, and persons with long-term illness (oncological, terminal and other chronic diseases). The same situation is observed on children care in spite of an important development of the formal services.

This role of the families on social provision in Portugal, is an important basis of Boaventura Santos (1987, 1993) thesis about the Portuguese society <sup>16</sup>, that have in the concept of «welfare-society» one of his core interpretative keys.

According this thesis the family support is part a more large primary social support network based on reciprocity (family, extended kinship, neighbourhood...). The idea of Santos is that this strong pre and post-modern welfare society in Portugal compensates, at least partially, the weakness and inefficacy of Welfare State. As it has been argued, this point of view is consistent with, one of the distinctive aspects of the southern welfare regime: the relevance of the social capital that the reciprocity resources represents, namely in the area of social care.

Although, the present context of societal and family pattern transformations, and their expression in the Portuguese society, puts important questions and threats to the informal social support networks. At a general level the intensive urbanization, the migrations, the family nuclearisation, produce isolation and weakness of the extensive family networks. The same effects result of the increasing participation of women in the labour market. In other plan, the demographic tendencies, namely the ageing in contemporary society and the declining birth rates, made the family role as the prime resource of welfare, more complex and difficult.

In the Portuguese society, at the same time we can observe this general tendencies, there are evidence of high levels of neglected children, lone elderly people and of demand for formal care services [pointed to the fact that informal networks](#) do not always answer families' needs for support (cf. Wall et al., 2001). In this sense, an important question is to understand how strong is informal social support in Portuguese families today?

The use of empirical studies on family dynamics and networks in Portugal is one of the ways to illuminate these issues. In this paper we mobilize the information and conclusions of two relatively recent national inquiries. One is a national survey on family dynamics and informal support networks of families with children in Portuguese society, realized in 1999 (Wall et al., 2001). Other is also a national survey on family dynamics and division of labour between women and men, that fieldwork had place in 1999 (Torres et al., 2004).

The first study analysed the volume and kinds of support received by families with children and considering the gender and type of tie of the providers with the family (relatives, friends, neighbours). According with the results of the inquiry many families have a low level of informal support and the role played by the extended kinship in providing support isn't significant.

*Analysis of the main characteristics of informal support networks in Portuguese families with children showed that many families have no support or a low level of support over many years of married life and that extended kinship does not play a significant role in support networks. Assistance flows mainly from parents, from women rather than men and from the wife's side of the family rather than the husband's. Experience of support also varies according to the life-cycle and to family forms, with assistance provided to higher proportions of families after the birth of a child, to legally married couples and in complex family households. Finally, with regard to social structure, informal support networks were found to be unevenly distributed in Portuguese society: needy families with low educational levels and a less favourable class position have the lowest levels of support over the course of married life. Working-class women who work full time have had less access to informal support and unequal access to child-care facilities (Wall et al., 2001: 230)*

At the same time, the study points out that there are very important social divisions between families informal support and also underlines the gender issues, namely in terms of women surcharge.

Considering the focus of this paper, the second referred study analysed different relevant aspects, namely the family networks role in the domain of the children and elderly people care.

Relatively to the children care the inquiry concludes that the «family solutions» not are in Portugal so dominant as supposed by the researchers and some literature. In fact, the formal solutions based on crèches, kindergartens and other services are the major part of children care (from 0 to 10 years old) in the present (Torres et al., 2004: Table 4.1).

In a quite different tendency, concerning the elderly people with special needs support, the survey concludes that the care solutions based on family network (living with the inquired or relatives) remains the more significant part (52,6%) but, at same time, an important part of the elderly lives alone in yours own home ( $\pm$  45 %) and receive support by the relatives (Torres et al., 2004: Table 4.13).

This study also presents different data that converge with the previous referred work concerning the social divisions and gender issues. Effectively, on the one hand, the data collected points out that the access to a *family network as resource* is strongly related with the *other resources* (economic and cultural namely) of the individuals. And, on the other hand, it confirms that relatively to the children and elderly care family solutions there is a clear sexual division of unpaid domestic labour between women and men (cf. Torres, 2004: chapter 4).

The South Europe is a mosaic of different colours (Estivil, 2000) and the Portuguese society has some relevant particularities to analyse the role of family networks and especially relevant to the consideration of the gender issues.

As we can observe in the Figure 4, Portugal has one of the highest female activity rates in the European context, close of the Scandinavian countries and Netherlands. Relatively to the other Southern European welfare regime countries the contrast is evident both in the present and when we consider a longitudinal perspective. As reflect the Table 5, in Portugal the female activity rate remains at a higher level than Spain, Greece and Italy.

Figure 4: Employment rate by sex, 2004



Table 5: Female employment rates in Southern Europe

	1999	2000	2007
Portugal	59,6	61,7	62,0
Greece	40,3	45,2	47,4
Italy	38,1	45,2	46,3
Spain	37,3	48,3	53,2
<b>UE 25</b>	<b>52,6</b>	<b>55,7</b>	<b>57,4</b>

Source: Eurostat European Union Labour Force Survey  
Notes: 1999 – UE15

Obviously this aspect impacts considerably the woman situation as the principal informal provider of care in the family networks in Portugal, considering the unpaid domestic work and the fulltime paid work accumulation. And if this dimension is particularly significant when we think about the Portuguese informal care networks (and in the Southern Europe in general) as *not a family solidarity network* but as *women welfare* (Santos, 2002) their most important social meaning is related with the situation of working women in social groups with reduced or inexistent informal support and scarce economic resources (cf. Wall et al., 2001).

These different elements authorize to conclude that if the role a family networks remains a important dimension and particular characteristic of Portuguese society in the context of the Southern welfare regime, namely when we adopt a comparative perspective, *the idea of a strong pre and post-modern welfare society must be challenged* (Wall et al., 2001: 213). In reality, the low level a family support verified for an important number of families and the social inequalities related with their social position, cultural and relational resources put in question the possibilities of the families network effectively to play the role a *welfare society*. The fact, in this context, as remarks Wall et al. (2001: 230) *the failure to combine and balance [the] different elements of welfare, in weak or still expanding welfare states such as Portugal, usually leads to high levels of poverty and neglect and to a dramatic overload of work for women*.

Figure 5: Strengths, weaknesses, opportunities and constrains of the primary solidarities in Southern Europe

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Family networks and family solidarity as social capital active in different events and cycles of life (childe care, elderly care, illness, family breakdown, unemployment, etc.)</li> <li>• Family networks as nuclear element of «integrated precariousness model» with relevant function in the absorption and relief actions face of precariousness and social exclusion processes</li> </ul>	<ul style="list-style-type: none"> <li>• Social inequalities reproduced by a social protection and social care system based on family networks</li> <li>• Very important gender issues puts by the informal care system as <i>women welfare</i>, especially for the working and social disadvantaged women</li> <li>• High levels of poverty and neglect (re)produced by a passive subsidiarity system with strong family responsibilities and weak institutional services and resources</li> <li>• Difficulty to answer to the social needs of persons without family and the difficulty to guarantee the <i>right of family solidarity</i></li> </ul>
Opportunities	Constraints
<ul style="list-style-type: none"> <li>• Valorisation of informal solidarity as concrete solidarity, reciprocity and emotional investment</li> <li>• Reinforcement of <i>friendly family policies</i> namely in the domain of work and family conciliation and the support of the caregivers</li> <li>• Reinforcement of the gender equality policy</li> </ul>	<ul style="list-style-type: none"> <li>• Isolation and weakness of the extensive family networks as result of a social dynamics of intensive urbanization, migrations and family nuclearisation</li> <li>• Increasing participation of women in the labour market.</li> <li>• Ageing and declining birth rates</li> </ul>

Source: own elaboration

Then, in a global perspective, we can summarise the strengths and weaknesses, or in other words, the potential and limits, of the primary solidarity in Portugal in the context of Southern European welfare systems and at same time to identify its major challenges (opportunities and constraints) (cf. Figure 5).

### **The primary solidarity and family networks in Portugal: any paths of social policy innovation?**

In 1997, Jane Lewis wrote that *both in the public spirit as well in the academics thoughts, is mainly the place occupied by the family that distinguish the South Europe welfare states than Northern. When asked about what characterise the South European countries, is probable that an inhabitant of London or Paris answer something like: «the families are more closed there than here» or «there, we can take advantage of the family»* (Lewis, 1997: 331).

As we have been viewed the families in the Southern European countries, including Portugal, are submitted to a complex social process that become the family networks less capable in present than in the recent past to play the same role as social care provider and protection against social risks.

Then the question is if there are any paths to preserve and develop the potential of the family networks in the Southern Europe? And what kind of institutional arrangements is possible to establish between the informal networks and social policy innovation considering the constraints and opportunities in the actual context?

Of course these questions suppose to considerer the positive dimension of the informal solidarity in Southern Europe and to support the idea of developing and innovating the social policies towards a higher level of institutional support to the families and informal providers than the actual public policies, specifically in Portugal.

From this point of view the aim is not to equalise these different forms of social care as equivalents but adopt the perspective that the family and public solidarities are at same time interdependent and irreducible one to other (cf. Lesemann & Martin, 1995). According with different national reports considered by this authors in a study on social care of the elderly people in different welfare states, the family intervenes in a different perspective that the public services or professionals. That specifically characterise the family care work is the practical and emotional support alimented by duties or love and developed with adaptability, plasticity, exclusivity and permanence. And in this sense the reconaissance of the relevant support provided by families should imply for the public policies the financial and psychological support of this action (cf. Lesemann & Martin, 1995: 124 & 125).

Then, the agenda of public policies in this domain is the reinforcement and innovation of family policies namely in the domain of work and family conciliation and in the support of caregivers in a perspective of valorisation of the informal solidarity potential, of the gender equality and, according with Wall et al. (2001), with more sensitivity to the more disadvantaged families' needs for access to public facilities or other services public-supported.

Considering, in the recent years, the public policies orientation, direct or indirectly related with this domain, is

possible to identify positive measures and initiatives, namely the enlargement of children care services developed in cooperation with the ONG (Private Solidarity Network), the pre-primary education coverage (national system) and the equipments and services for the elderly people. Some of these aspects, between others, are precisely underlined in the report produced by Ferrera, Hemerijck and Rhodes (2000) in the context of the Portuguese presidency of European Union. These initiatives are effectively positive impact on gender equality, as is remarked by Torres et al. (2004), but this programme should be continued especially with the enlargement of crèches network because the coverage still limited <sup>17</sup>.

In the area of equipments and services for elderly people is necessary not only its enlargement, specially the home care services<sup>18</sup>, but also more innovation. The ageing process of the population, the conciliation between work and family and the support of the caregivers require a philosophy of proximity and flexibility in the conception and delivery of services as condition to match with the families needs <sup>19</sup> (e.g.: more extensive timetable, support for punctual and specific needs like leisure, weekends, holidays, professional tasks, etc, and, in general terms, support against stress and exhaustion and more easy conciliation between work and family care responsibilities).

In other plan, the social policies in Portugal, after 1996, have been adopted measures in the domain of social benefits namely in areas related with the family children care and protection, like the rationalisation of family allowances, benefit for parents forced to interrupt their job to care their children who are handicapped or suffer from chronic illness and enlargement of maternity leave (cf. Ferrera, Hemerijck and Rhodes, 2000: 122-3). But other dimensions, especially for the families with elderly people, should be adopted in order to promote the conciliation between the work and the families care, like part time facilities, working hours flexibility, labour rights protection and absences from work regime, similar that has been established for other kinds of family care.

At same time, new social protection guarantees are necessary for the family caregivers like compensation for wages losses and family expenses increase, rights of retirement, etc. Here we are in a different perspective of the supporters of the establishment of a social salary<sup>20</sup>, not basically for financial constraints but for social reasons, agreeing with those that alert for the *risk of commodification of love*.

Another important point concerns the education and training of the informal familial caregivers. It is true that the family work are clearly distinct that the formal care providers, the families, and especially the main caregivers, need not only practical and emotional support but also education in the specific fields. Then, one important strategy of coping the families and of the valorisation of informal solidarity is the investment in a national programme oriented for the information and education on specific diseases (e.g.: dementia, chronic diseases, rehabilitation, stress management, etc), realised in articulation between the primary health care and social assistance services.

Effectively there are «clouds» over the informal and family solidarity, but the possibilities to take advantage of this

concrete solidarity, reciprocity and emotional investment, this form of social capital more present in the social world of Southern Europe societies, are deeply related with tree nuclear perspectives.

First of all, it is necessary a radical change in the perspective of family solidarity analysis. The family solidarity is not reducible to the public solidarity or other forms of formal services and care.

In second place, the family and the public solidarities are not dissociable. The support of the family and informal solidarity potential requires the financial and political public investment because not only all the families in general need support (in kind and cash) but also particularly the more disadvantaged. In this sense one way of social policy innovation is to move on to a more active subsidiarity.

Finally, the role of the State is essential to guarantee the right to the social care and some social risks protection for the individuals that there haven't family or don't can beneficiate from the family protection.

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## Notes

<sup>1</sup> For example: MIRE, *Comparer les systèmes de protection sociale en Europe du Sud*, Encontros de Florença, Paris, 1997 e Martin Rhodes (ed.), *Southern European Welfare States – Between Crisis and Reform*, Londres, Frank Cass, 1997.

<sup>2</sup> Pereirinha (1997 a, b) supports, in line with Liebfried, but with a new methodology, the necessity to take in consideration the policies against the poverty, integrating the recent theoretical developments and political concerns, integrating in this framework the countries of the South of Europe.

<sup>3</sup> As Rhodes underline this analytical perspective not reduce the richness and utility of the *tree world's* proposal of Esping-Andersen, but reinforce the necessity of other approaches. As Ferrera (1997) argue, the essential of the debate it is the clarification of different aspects that have been neglected in the study of the social policies in the South Europe, namely the quality of the state apparatus and the party competition dynamics. This approach constitutes an important contribution to the study of the others countries and to the adoption a innovating typologies (cf. Ferrera, 1997: 24).

<sup>4</sup> Roussel (1992), based on the main socio-demographics indicators, and considering of 30 years series, established tree main types of families: the North Europe Family (Sweden, Denmark and Norway), with a relative high rate of fertility and a high divorce incidence, union of fact and births out of marriage; the Occidental Europe Family (Belgium, Luxembourg, Netherlands, United Kingdom and France), with low rate of fertility and a medium-high divorce incidence, and a relative low incidence of union of fact and births out of marriage; the South Europe Family (Spain, Greece, Italy and Portugal), with low rate of fertility, divorce, union of fact and births out of marriage (Roussel, 1992: 115-131).

<sup>5</sup> Castel based on the axes of work integration / disintegration and of social and family insertion / not insertion, establishes four zones of inclusion and exclusion: the *integration zone* (stable job and relational support); the *vulnerability zone* (associating job precariousness and fragility on social relations); the *assistance zone* characterised by the absence of work and a good social and familial integration; the *zone*

of «desaffiliation» combining absence of work and social and family support (Castel, 1996).

<sup>6</sup> This *welfare mix* arrangement contrasts with a complementary role of the primary support network (active *subsidiarity*) that assumes an additional role face to the State.

<sup>7</sup> Ferrera, has as reference Perez Dias e Rodrigues (1994), Spanish authors that designate the present labour market and societal fragmentation the *four corner society*, in allusion of the traditional children game. In the reality this four corners represent four spaces differentiating by the opportunities of to have a job / income and social protection: i) the protected nucleus of labour market; ii) the sector of temporary jobs; iii) the sector of informal economy; iv) the unemployed groups (Ferrera, 1996: 21).

<sup>8</sup> Cf. Gough,( 1996), Rhodes,( 1997).

<sup>9</sup> Unfortunately wasn't possible to update these data because the European Union Social protection Reports changed the system of indicators presented in the report of 1993 and the data collected by the OECD (Benefits & Wages) are available uniquely for some of these indicators.

<sup>10</sup> In Portugal, the percentage of statutory pensions, below or equal to the minimum pension of contributory regime of social security was respectively: 96,4 in 1986, 94,9 in 1988, 94,4 in 1990, 93,3 in 1992, 87,7 in 1994 e 88,1 in 1996 (Santos, B. et al., 1998 – Table 22).

<sup>11</sup> Portugal is in this panorama the only exception, since a adoption in 1996 of Guaranteed Minimum Income. In Spain, there are in all the regions schemes of income guarantee, but there aren't a national programme and occurring important regional disparities. In Italy only there are some municipal programmes because the *minimo vitale* haven't been established as social right at national level. In Greece there aren't any scheme of income guarantee.

<sup>12</sup> The number of beneficiaries increased, in Spain, ten times between 1982 e 1992 (Laparra e Aguillar, 1997: Table 1).

<sup>13</sup> The authors use a similar dimensions and areas of Esping-Andersen (1999) to establish the social expenses on family policy, but point out the limits of this approach don't take into account transfers trough taxes, mandated benefits and voluntary contributions (Guo & Gilbert, 2007: 312).

<sup>14</sup> Cf. (Guo & Gilbert, 2007: Table 6)

<sup>15</sup> According with the approach privileged in this paper we do not consider, more deeply, this important analytical dimension.

<sup>16</sup> See also M.J.Hespanha (1993), P. Hespanha (1993), Arriscado Nunes (1995), Sílvia Portugal (1995) and (Sposati e Rodrigues,1995).

<sup>17</sup> According the OCDE Report 2006, *Early Childhood Education and Care*, the Portuguese coverage rates for children 0-3 years were: centre-based crèches (11% coverage – 8-9 hours daily); crèche familiar (1.5% coverage). In contrast, for children 3-6 years: from age 3, about 60% of children attend «jardins de infância» rising to 90% by age 5-6 years (average coverage for children 3-6 years is 76.3%).

<sup>18</sup> The implementation of the National Network of Integrated Long Term Care (RNCCI) would be a very important contribution but for the moment the programme is focused on creation of equipments network for the short, medium and long-term care.

<sup>19</sup> Cf. Wall et al. (2002) for an overview about the problems, needs and strategies adopt by families with elderly persons dependent on care.

<sup>20</sup> This question involves another meaning if it is integrated in the debate about basic income (or other forms of citizenship income) or the debate about work share.