

Southern Welfare States: Configuration of the Welfare Balance between State and the Family

Claude Martin

▶ **To cite this version:**

Claude Martin. Southern Welfare States: Configuration of the Welfare Balance between State and the Family. Campus. Southern Europe? Italy, Spain, Portugal, and Greece from the 1950s until the present day, pp.77-100, 2015. halshs-01179541

HAL Id: halshs-01179541
https://shs.hal.science/halshs-01179541

Submitted on 22 Jul 2015

HAL is a multi-disciplinary open access archive for the deposit and dissemination of scientific research documents, whether they are published or not. The documents may come from teaching and research institutions in France or abroad, or from public or private research centers.

L'archive ouverte pluridisciplinaire **HAL**, est destinée au dépôt et à la diffusion de documents scientifiques de niveau recherche, publiés ou non, émanant des établissements d'enseignement et de recherche français ou étrangers, des laboratoires publics ou privés.

Martin Baumeister, Roberto Sala (eds.). Southern Europe? Italy, Spain, Portugal, and Greece from the 1950s until the present day. Francfurt: Campus, 2015

Southern Welfare States: Configuration of the Welfare Balance between State and the Family

Claude Martin, Research Professor CNRS (UMR 6051, Rennes)

Since the mid-nineties, following the publication of Esping-Andersen's seminal book, "The Three Worlds of Welfare Capitalism" (Esping-Andersen 1990), a discussion has developed about the hypothesis of a fourth welfare regime: a Southern European one, i.e. a common model shared by Italy, Spain, Portugal and Greece. Some authors argued that common traits justify the existence of a Southern or Mediterranean ideal-type beside the continental, liberal and universalist ones,[1] while others considered the Southern configuration as a late development of a continental regime, possibly with some historical, institutional and cultural specificities (Katrougalos 1996).

After having reached its acme in the nineties, this discussion was rediscovered recently, on the occasion of the 25th anniversary of the publication of Andersen's crucial and inspiring book. The debate still concerns the characteristics and specificities, the significant differences and gaps in Southern Europe compared to other welfare state regimes. In other words, the main question is the following: to what extent does the Southern configuration add anything relevant to the previous main dimensions of Esping-Andersen's model: in terms of social stratification, decommodification of the labor force and nexus of protection in the triptych - state, family and market? Looking back, it seems as if this debate arose only due to the discussion related to Esping-Andersen's model; a discussion which, in the end, seems weakly connected to the broader literature on the historical making of Southern Europe.

However, unquestionably, the historical context of this scientific debate has changed drastically in the last three decades. Just to give an idea of this huge variation of context, we could, for example, distinguish between, first, the period of integration into the European Economic Community (EEC) of Greece (1981) Portugal and Spain (1986), which were just democratizing after having lived through a long period of dictatorships and autocratic regimes, when Italy was already considered one of the classical Bismarckian welfare states; second, the spectacular modernization of these four countries in the nineties which leads to a debate concerning the "New Southern Europe" with "the crucial role played by welfare state programs in the anchoring of democratic institutions and in promoting social cohesion and economic growth" (Ferrera 2010, 617); and finally, the current situation where these four Southern countries[2] are qualified PIGS in Europe - a terrible acronym used once again in economics, finance and media since 2008 – and some of them have beentaken over by the Troïka since 2010. These variations over time explain different contradictory comments addressed to Southern European countries depending on the period: "Portugal as Europe 'star pupil'" in the beginning of the nineties, or the "success of Spanish economy" in the early two thousands; comments which contrast peculiarly with the current picture of these countries.

[1] See table 1 below for the characterization of this typology.

[2] Some comments in newspapers add Cyprus and Ireland - a quasi-Southern liberal state, and also sometimes France and the UK, to this stigmatized category.

Is it still useful to reactivate this academic discussion about the relevance of another welfare state model in the South in 2015? It could seem a bit superfluous when considering the tremendous impact of the 2008 financial crisis on Europe and particularly on Southern European countries; an impact which may lead to the risk of Europe dismantling like an area suffering the retorts of an earthquake. Do we still need a confirmation of a Southern configuration when looking at the social and economic conditions of European citizens in Greece, Portugal, Spain and Italy, or the situation of the health and pension systems or social services in these countries?

I argue that the 2008 financial crisis spurs the revisiting of that discussion, not the scrapping of it. But more than a pure reproduction of the debate initiated 25 years ago, it is necessary to consider national trajectories or, to put it differently, to abandon the discussion concerning ideal-types and prioritize the processes of change and capacities of resilience of the different welfare systems. Southern European welfare states are under radical threats and some media and political comments suggest that they are just imploding. But it is crucial to consider that this extremely negative economical context affects all Europe without exception. This means that we are in a very different or even reverse situation compared to the eighties and nineties: the one where continental countries, like France in particular, could follow the Southern European track, as many other Mediterranean countries such as Cyprus, Malta or even Turkey or Israel already do, an "extended family of Mediterranean Welfare states" (Gal 2010).

In this paper, we propose, in the first section, to come back and synthesize the main arguments of this debate since the nineties and argue that this discussion is crucial, not only for academic or theoretical concerns, of course, but also to think of the present of Europe and offer a guide for understanding the general process of restructuring European welfare states. On the one hand, as stated by Luis Moreno (2008), one has to consider that the changes in Southern European countries during the last twenty years were such that some of these countries, like Spain, followed a 'Nordic path', which means that changes overthrew the initial configuration of the ideal-type. But, on the other hand, the analysis of the Southern configuration is also useful beyond the South to figure a Southern path or trajectory which could be followed by other countries (like France, at least) under certain conditions. Among them, and following Kees Van Kersbergen and Philip Manow (2009), we consider that religion and churches are crucial in welfare framing as they explain particular political coalitions which are still at stake at the moment. This theoretical orientation could serve social scientists in interpreting some current phenomena and trends.

In the second part, we focus on one of the characteristics of Southern configuration underlined in the nineties: the central role of the family as a source of protection against risks and vulnerability, or a social bumper. The question nowadays is not only the transfer of responsibility for social problems from the state, or even local authorities, to the family in a shedding process but the careful investigation of, first, the transformation of the family itself in the meantime and also of the emergence of new social risks which are challenging caring capacities of our societies. Families have transformed substantially in all European countries, particularly due to the increasing number of women in the labor market, but also as Luis Moreno and Pau Mari-Klose argue, due to the succession of generations which radically transform social expectations and practices (Moreno and Mari-Klose 2013). This revolution of the gender division of labor hugely modifies the question of care, caring task, care workers, respective roles of formal and informal carers, etc. This variable plays a crucial role in understanding simultaneously the process of change and the capacity of resilience of welfare systems in the South but also in many other nations.

Lessons from the Welfare State Discussion Concerning the South of Europe

Inclusion or Exclusion of the South in the Welfare State Modeling Business

At the risk of being too simplistic, one could identify different and main phases in the welfare state comparisons that will progressively become a "welfare state modeling business" (Abrahamson 1999). The first one (from the Second World War to the late eighties) was mainly concerned with a historical, developmental and/or genealogical perspective, as the main issue, for many analysts, was to understand how industrialization was progressively accompanied by different systems of regulation and protection against some risks due to a "huge transformation" (Polanyi 1944). In Polanyi's terms, this process was less a functional link between industrialization *per se* and a growing need for social policies, but rather the necessity to compensate the development of a full-fledged market where human society became an "accessory of the economic system" (Polanyi 1957 [1944], 73). Here comes the idea that labor became a commodity in a self-regulating market as well as, even if not expressed as such by Polanyi,[3] the necessity to decommodify it to avoid the destructive impact of the economic market logic on traditional forms of protection: bonds of kinship, family ties and guilds.

Robert Castel adopts a similar perspective. In his seminal book *Les métamorphoses de la question sociale*, Castel proposes a genealogy of the "salariat" (the salary system), following its transformation since the *ancien régime*, to show the protecting role of social and labor laws, which allowed an alternative form of property, a "social property", for those without material property to protect themselves against life's risks (Castel 1995). Castel also put emphasis on the interconnected role of employment contract and protection of relatives in the individualization process of modern societies. As he stated himself: "No individual without supports". (Castel 2009, 443).

According to this perspective, many authors insisted on the tempo of modernization and its effects on the process of definition of the welfare systems (Rimlinger 1971; Wilensky 1975; Flora and Heidenheimer 1981). In this process, steps of development and a large series of variables were identified: institutional and economic variables, historical events, configurations of actors and coalitions, political mobilization, circulation of ideas, learning processes, etc. Two main matrixes were also underlined: a Bismarckian and a Beveridgian one in two different historical contexts: revolutionary menace of the working class and fear of the development of the International socialist movement in Prussia at the end of the 19th century; adaptation of the British welfare system in the context of the warfare economy at the request of Ernest Bevin, Minister of Labor under Winston Churchill in 1940, to prepare the post-War reforms. One of the limits of this genealogical angle of understanding was probably its insistence more on common mechanisms and instruments, whatever the political and institutional background of each nation state, than on differences. As Kees van Kersbergen stated: "The prime explanatory problem for these theories concerns the very existence of, rather than the variation among, Western welfare states" (van Kersbergen 1995, 10).

[3] Polaniy's terms were more to "domesticate the market".

These matrixes and the description of their national variations across Europe opened a second period, which ended at the end of the 20th century. The main issues concerned comparative frameworks and propositions of ideal-types. Following some pioneers, like Richard Titmuss (1974), this new phase gave rise to a very rich discussion about the characteristics and number of ideal-types. Esping-Andersen's seminal book, *The Three Worlds of Welfare Capitalism*, synthesizes brilliantly this discussion as it reviews the main arguments in the academic literature, builds a specific theoretical framework and defends a typology which provoked an intense discussion all at the same time. It is precisely in this context of intense debate about typologies that the idea appeared to distinguish a "Latin rim", "Mediterranean", "Catholic", "southern" type of welfare system, but also some other "families of nations" (Castles 1993) from the Post-Soviet to Asian and Confucian nations (Jones 1993). But the comments on this seminal book didn't focus only on the number of ideal-types, but also on other crucial issues like gender, which changed the global picture of national differences drastically (Lewis 1992; Sainsbury 1994).

A new phase has developed since the turn of the last century, when research focused on the process of change at stake, qualified in various ways by the ideas of dismantling, downgrading, and recalibrating welfare systems and sometimes also converging and liberalizing them (Pierson 1994; Svallfors and Taylor-Gooby 1999; Esping-Andersen et. al. 2002). The question of the level of change becomes central (Hall 1993). Taking into account a series of reforms since the end of the nineties, this literature questions the capacity of governments to adapt their respective welfare systems. Contrarily to Esping-Andersen's initial diagnosis, which insisted on the inertia of Bismarckian's original pact which made it a "frozen welfare regime", many authors suggest nowadays that a progressive, but very deep change has finally occurred even in the frozen landscape (Palier 2010; Palier & Martin 2008). This new phase has also given rise, since the 2008 financial crisis, to a new crucial issue concerning the resilience of these societies and nations, their capacity for adaptation confronted by common threats and challenges (Hall and Lamont 2009; Hall and Lamont 2013; Crouch 2015).

Main Arguments to Consider a Southern Model

Esping-Andersen's typology in the *Three worlds of Welfare Capitalism* generated many critiques and comments; at least two main types of comments: first about the capacity of this typology to include all the national welfare systems in Europe and more largely in developed countries, a discussion which also raised the question of the adequate number of ideal-types; and second, more fundamentally, about the gender issues and the limits of Esping-Andersen's theoretical framework to catch gender inequalities, caring issues and defamilialization of caring tasks (see the seminal paper by Jane Lewis 1992).

Maurizio Ferrera (1996) and Martin Rhodes (1996) are among the first who exposed the arguments for a specific Southern European welfare regime (see also Moreno 1996). In his 1996 paper, Ferrera noted that: "unfortunately, the academic debate has so far largely neglected the study of the south European Welfare states" (Ferrera 1996, 18). Mainstream literature during the eighties and nineties indeed treated Southern European countries generally as "late-comers on the same path as that followed by other continental, 'conservative-corporatist' nations" (ibid.) or argued that these countries only "reflected the

delay in the construction of the welfare state and more generally the relative economic underdevelopment of the Mediterranean South" (Katrougalos 1996, 43). Only a few authors insisted on the specificities of these "Latin rim" countries: the rudimentary character of the welfare programs, the influence of Catholicism on their framing and the prominent role of the family as a social bumper, but hesitated to define these specificities as an ideal-type (Leibfried 1992; Castles 1993).

In his first attempt, Ferrera tried nevertheless to compile a preliminary descriptive list of features, without expecting *a priori* to formulate a real ideal-type. Looking at the four main Southern European countries (Italy, Spain, Portugal and Greece), he developed some hypotheses to explain these specificities, not by underdevelopment or delay, but with a historical-institutionalism perspective. The first feature of this "Latin rim" regime concerns the cash benefits which are highly fragmented and corporatist-driven (mainly pensions), in particular in Italy and Greece (which is also the case in France, a partly Southern and Mediterranean country as well), but also very dualistic with a clear opposition between overprotected insiders (the "citadels of *garantismo*"*:* the regular white-collar labor force, public employees, and the labor force of large enterprises) and outsiders (irregular workers, traditional services, agriculture, but also the female labor force and youth). Both Ferrera and Rhodes mentioned "peaks of generosity" and "gaps of protection". A second feature, quite counter-intuitive for a continental Bismarckian orientation, is the adoption of a universal health care system: national health services (since 1976 in Portugal, 1978 in Italy, 1983 in Greece, and 1986 in Spain), a circumstance which justifies the expression of a "hybrid" model. But this turn to universalism appears to hide paradoxes like a public/private mix of services, which resulted in an enormous waste of public money; an incomplete shift of funding from contributions to taxes; a dual structure of services as these national health services are in fact mainly targeted to the most vulnerable groups; etc.

Compared to the continental welfare regime, the Southern configuration has other specificitiesthe role of political discretion, to name just one, which is very different from the administrative or professional discretion role and comes close to "electoral manipulation of welfare benefits" (Ferrera 1996, 25). The absence of a long tradition of technocracy (compared to France, for example), "the weakness of state institutions, especially in terms of bureaucratic professionalism and autonomy, the failure to modernize the civil service in a 'Weberian' sense prior to the mass expansion of welfare programmes has offered a fertile ground for the persistence of clientelistic relations" (Ferrera 1996, 30), which may justify using this qualification for the ideal-type. Ferrera and Rhodes also insist on the necessity of distinguishing between Northern and Southern regions at least in Italy and Spain, as these Northern regions are closer to the conservative/ continental/ corporatist regime than to the respective Southern regions; "the persistence of backwardness in many 'South of the South'" (Ferrera 2010, 617).

In summary, these authors mentioned a series of characteristics: strongly gendered labor markets; a substantial shadow economy with the important role of the informal labor market; the weakness of state intervention; the absence of a state technocracy; clientelism or persistence of "patronage systems" to distribute cash subsidies to political client groups; important territorial disparities; and last but not least, the expansion of these systems at a time when other continental welfare states were already confronted with the need torestructure. This accumulation of features finally demonstrated the necessity of complementing the three classical worlds of welfare (see Table 1).

Table 1: Four Welfare State Regimes

Welfare state regimes	**Liberal minimalist**	***Southern clientelist***	**Conservative corporatist**	**Social democratic universalist**
Aim of the system	Regulation of poverty; needs' satisfaction through the market	*Dualistic cover of social risks (over-protection of core /regular workers and under-protection of vulnerable and atypical workers)*	Social protection of male workers	Universal access to high level of benefits and services to all citizen
Norms of access	Means-test	*Work and citizenship (in principle)*	Work	Citizenship
Financing	Taxes (+) & contributions (-)	*Contributions (+) and taxes (-)*	Contributions	Taxes
Regulation	Central state	*Clientelist local state*	Unions	Decentralized state
Nexus of solidarity	Market	*Family*	Family	State
Level of decommodification	Weak	*Weak*	Medium	High
Level of defamilialization	+	- -	- -	+ +
Level of social protection	Weak	*Moderate*	High	High

Various authors (Andreotti et al. 2001; Karamessini 2008) developed some additional features and hypothesis: the weight of small-scale farming and the role of migrations. As far as social stratifications are concerned, Southern Europe seems also characterized by the weight of the self-employed and small farmers in particular, even after the democratic transition. The self-employed and small landholders are not generally considered defenders of collective agreements and social protection systems, at least in South and Western Europe.[4] A weaker position of the state, a toleration of tax-evasion and informal labor, self-reliance and family solidarity could be the results of the weight of the self-employed in the social structure, a group which had a weaker voice in the political arena.

Andreotti et. al. (2001) also insist on the impact of migration, an important flux of male population toward Northern countries in the fifties and sixties which provoked a real hole in the work force. For Andreotti et. al., migration and a low level of proletarianisation represent two major elements to explain the Southern Europe configuration. "Waves of emigration helped to slow the process of proletarianisation. By removing labor from local market, migration allowed a smooth transition from agriculture to an industrial economy. The relatively low level of proletarianisation, and conversely, the persistently high level of self-employment are both important characteristics of the south European model, as they have heavily influenced its structure" (Andreotti et al. 2001, 44). Karamessini even argues that "emigration policy may be viewed as a functional equivalent of employment policy until the mid-1970s", as it prevented mass unemployment (Karamessini 2008, 521). One can also understand emigration as a determinant factor to explain the "weak industrialization" in the South of Europe, underlined by Sapelli (1995), or a heavy price to pay during the transition to modernity.

[4] Nordic countries offer another configuration with powerful agrarian parties defending universalist flat-rate social policies. "Agrarian parties in the north voice resistance against the income-differenciated social benefits that Social Democrats favored. Instead, they preferred universalist, flat-rate benefits because many small landholders had no long history of steady income and therefore feared that they would actually be unable to benefit from welfare entitlements that were contribution financed with contributed-related benefit levels" (van Kersbergen and Manow 2006, 27).

Centrality and weakness of the state go hand in hand with strength and marginality of the family and the third sector, that is to say with the weakness of civil society and all its consequences like the weakness of universalistic principles or strength of corporatism, clientelism and specific arrangements with the rules. With such a social structure and configuration, Southern European welfare systems are less the result of social movements and mobilization and often preceded democratization.

These aggregated factors generated important disparities and a particular "southern type of poverty linked to lower average incomes, higher income inequality and a higher poverty rate" (Rhodes 1996, 8). But, as Rhodes stated: "Perhaps more important than economic disparities as such are the quite different political, cultural and class disparities that persist in these countries of uneven growth, which to some extent also coincide with contrasts between pre-industrial and increasingly post-industrial areas and populations" (ibid.).

In their first insights, Ferrera's and Rhodes' gave priority to developmental factors and explained the Southern road from a politico-institutional perspective. Even if it seemed possible at first glance to subsume Southern European countries under the continental/conservative regime, they argued that "the 'socio-political etiquette' which inspires their functioning is hugely different" (Ferrera 1996, 29). First, because of the traces or even stigma of authoritarian regimes and rules, which may explain at the same time the resilience of institutional traditions, like corporatism, a traditional atrophy of civil society, but furthermore, the radicalization of a Left excluded from government for significant periods of time, remaining in this way rigid defenders of their political clienteles in the work force, even at the expense of more vulnerable workers.

And here come the crucial arguments concerning political conflicts and coalitions and their specific combination in Southern Europe, linked to the fight between the state and the Catholic church. Following van Kersbergen's work about Christian democracy and the link between religion and the welfare state (van Kersbergen 1995), Kees van Kersbergen and Philip Manow (2009) gave particular attention to the crucial role of the electoral and political party systems, considering that "countries cluster on policy because they cluster on politics" (Shalev 2007, 289). They intend to explain the difference between Social Democrats and Christian Democrats when looking at the role of religion in Western welfare states framing. They reveal two different coalitions in each configuration:

> "The Social Democratic generous welfare states, which we find in the Nordic countries, have been the result of a coalition between Social Democratic parties and parties of agrarian defense (red-green coalition). One important precondition for this coalition has been the absence of a strong religious cleavage in the Scandinavian countries. On Europe's continent, in turn, we find welfare states that are the product of a coalition between Social and Christian Democracy (red-black coalition). This is due to the fact that the second cleavage represented in the party systems of continental Europe, besides the dominant left-right or labor-capital cleavage, has been the religious cleavage, a cleavage inherited from the state-church conflicts in the wake of the national revolution in which Liberal states' elites challenged the church in its former domains such as education or poor relief" (Van Kersbergen and Manow 2009, 22).

This perspective is very relevant to catching Southern European welfare state specificities. In a recent paper, Philip Manow goes further and argues:

> "The fundamental character of the political conflict reveals the explanatory limits of an argument based *solely* on socio-economic analysis. In these conflicts, religion becomes

> relevant, first in the explanation of the totalitarian episodes of the southern countries – since religion renders coalitions between workers and peasants impossible and thereby fosters the fascist path. These totalitarian episodes are then, second, an important explanatory factor for the persistence of political polarization in the postwar period, inter alia manifested in the fragmentation of the left in their party systems" (Manow 2015, 37).

For this author, this combined religious/political factor is crucial in each mono-confessional Southern country, as it explains at the same time the radicalization on the right and on the left side of the political arena: the reactionary and anti-republican Catholicism since the 19th century, the rift between a reformist and a radical left wing, and finally the "spiral of fear and mutual repulsion backed by violence until each side feels its very existence endangered by the other" (Martin, 1978, 17), which explains the war 'à l'outrance', to use David Martin's expression to describe this 'Latin pattern' and the violent shock between massive secularism and massive religiosity, between a clerical right and an anticlerical left.

> "The split between communist and social-democratic parties in the countries of southern Europe (Italy, Spain and Portugal, but also France)… is closely related to the decidedly anti-republican position held by the Catholic church in the mono-denominational Catholic countries of Europe's South, since the deep divide between a sharp anticlerical labor movement and pious farmers under close tutelage of the church left the political left without allies for a reformist strategy" (Manow 2015, 33).

These religious and political factors explain, much better than the economic one, the difference between Nordic, Continental and Southern countries, all of them concerned with a late industrialization. When a political alliance between small-holding farmers and workers was possible in the Northern (Protestant) countries, it was clearly rejected, "due to non-economic reasons" (Manow 2015, 40) in the Catholic South, marked by the violence of the confrontation between pious rural classes and the Marxist workers' movement.

Family as a Nexus of Solidarity

A Familialism by Default

Among the specificities of the Southern welfare state regime, a consensus emerged concerning the role of the family as a central nexus of solidarity. Maurizio Ferrera underlines "the importance and resilience of the family as a sort of clearing house for the welfare of its members – with significant implications in terms of gender" (Ferrera 2000, 168).

Many authors insist on this feature of the Southern configuration (see Flaquer 2000, Naldini 2003; Ferrera 2010; Gal 2010), which draws a specific familialist care regime:

> "In Southern Europe, it is taken for granted that it is up to households to provide for the welfare of their members and therefore no emphasis is placed on family policy. This is why citizens in these countries give the family the top priority on their value scale. Their levels of well-being depend more on family arrangements and connections than on the provisions of welfare state institutions. This is what causes at the same

> time the force of kith and kin and the reproduction of a system based on a limited amount of family-friendly public measures" (Flaquer 2000).
>
> "The family has historically been the cornerstone of South European societies, functioning as an effective 'social shock absorber' and welfare broker for its members and responding to a wide range of risks and needs, from childcare to unemployment, from care for the elderly to disabled and housing" (Ferrera 2010, 622)

But the interpretation of this phenomenon, or the hypothesis to explain it, is a controversial issue. On one side, some argue that family is "culturally" a nexus of protection in the South in the sense that people develop a peculiar sense of family and mutual solidarity based on legal obligations within the kinship. But on the other hand, it seems more appropriate to consider that family solidarity is precisely a result of this Southern (political more than anthropological) configuration itself, and not so much one of its foundations. And if it is so, what could be the impact on the Southern welfare model of the huge transformations of family structures and practices, of the evolution of gender roles, of new private expectations, of individual claims, etc.?

Familialism took a particular orientation in Southern Europe that Saraceno and Keck named "familialism by default" or "unsupported familialism" (Saraceno and Keck 2010).[5] Effectively, the absence or weakness in public interventions, subsidies and services to support families in their caring activities and responsibilities is a specific sort of familialism; a very different one compared to "supported familialism" developed in some other countries, and even more clearly a different choice than the one adopted in countries which give priority to "defamilialization" of caring tasks by supporting households to externalize part of these tasks to services and professionals, but also to employees in the formal or informal labor market. In a comparative perspective, it is clear that de-familialization is one of the main conditions which promote female employment, and thus female social citizenship.

We argue with these authors that (large) family solidarity or protection by close relatives (what we have called in French the "protection rapprochée", Martin 2000) is thus a result of this absence of support in the long run. Without these supports, families are *forced* and *required* to assume many caring responsibilities towards children, youth and elderly, but also towards many other vulnerable groups like handicapped or chronically ill people. They *have to do so* as there isn't any real alternative. This family nexus of solidarity also explains the relatively marginal role of social assistance and, of course, also the high level of poverty, as family solidarity is certainly not a way to reduce inequalities, but rather a factor which increases them (Martin 2004).

This configuration was effectively dominant in Southern Europe until recently. And it was clearly the case in the eighties and the beginning of the nineties, when the literature on welfare regimes developed. But wasn't this family nexus of solidarity also dominant in many other Western and Nordic countries just after the Second World War, which pleads for the hypothesis of an effect of long-term change more than of national variations?

In Southern Europe, this family responsibility had also drastic secondary impacts on family reproduction and gender, as underlined by Maurizio Ferrera:

[5] We can mention that "familialism by default" concerns a larger group of countries than the four Southern European countries under scope in this discussion, including Poland and Bulgaria (Saraceno and Keck 2010).

> "The lack of external supports and opportunities as regards housing, transfers and services has started to restrict the range of choices for young people and to act as a clear obstacle for family formation (marriages) and family expansion (children)… a problematic syndrome is emerging in this area: an institutional configuration originally built to serve the family is now working to erode its own foundations by discouraging, precisely family reproduction" (Ferrera 2000, 172).

Such a configuration put care obligations and the care work/burden on the shoulders of women, which means that "familialism by default" is also a typical gender model based on the "male breadwinner – female perfect housewife" contract. To figure this arrangement and its consequences and pathologies, Ferrera speaks of a "southern syndrome" characterized by: "Low rates of female employment, especially in Spain, Italy and Greece, and partly also the dramatic decline of fertility among women sandwiched between heavy home duties and unfriendly labour markets" (Ferrera 2010, 623).

But the main impact concerns intra-familial dependency, a gender and generational dependency. Family can be considered as a cornerstone of South European societies, as welfare is organized as a specific arrangement between the state, local authorities and households. The important thing seems to be to guarantee a minimal income to the household (or sometimes a network of households) by the access for at least one member (generally a man) of a family network to a permanent protected job and status, while the others remain dependent of this main male breadwinner. Even informal economy is connected to this "arrangement", when it allows working families to earn additional incomes through marginal activities and avoid taxes on the second income. Of course, this arrangement has had many negative consequences and generated a vicious circle in terms of insiders and outsiders, but also in terms of family trajectories:

> "In this pattern, rigid labor laws protected male workers who were heads of the family (male breadwinner model), undermining the possibilities of employment for women and young people. The direct consequences have been low adult male unemployment rates and high rates of female and youth unemployment. Their exclusion from the labor market has been functional to maintaining the system and re-enforced the familial culture" (Andreotti et al.2001, 54).

We argue, however, that this arrangement is not a "cultural trait", but rather a way or a strategy for the members of families to face adversity and compensate, as best as they can, for the absence of public support. It reveals a private and collective mechanism which corresponds probably to the famous family bumper against life's risks.

> "Under these conditions, crossing the formal / informal divide constitutes part of an array of family strategies to pool resources, and thus 'informality' does not absolutely reflect a rigid insider / outsider divide in labor market terms. It is mostly in respect of the steadily new forms of atypical work (i.e. short-term contract) in southern Europe, and the influx of immigrants lacking the capacity to benefit from family, kin support (and clientelistic ties) that the insider / outsider divide became more pronounced in labor market terms, requiring new policy measures" (Petmesidou 2013, 185).

From our perspective, the specific role of families in Southern European welfare regimes does not result from a common « cultural » heritage, but from the general institutional framework. In other words, we do not need to assume the existence of a « Southern European family model » in terms of a long-term cultural heritage.

The main victims of this state /household and family arrangements are unmistakably women and young people, particularly confronted with dependence from their parents and the necessity to accommodate in a context where the access to permanent jobs is almost impossible. The level of intergenerational cohabitation is one of the indicators of this phenomenon, very frequent in Southern European countries (Van de Velde 2008).

But this centrality of the family doesn't mean only conservative reproduction of gender roles or intergenerational domination. At the same time, as Trifiletti (1999) argues, considerable changes have occurred in Southern societies and emancipation of women and young people is also developing, but in a very different way: an emancipation 'within the family'.

> "This does not mean that women are not emancipated. While in northern Europe, women emancipate from the family, finding their place mainly *outside,* in paid – very often part-time – employment, in southern Europe women emancipate *within* the family, doing the same care work, in the same professional way, with the only difference that they do it for their families. In this sense, women in southern European states represent the link between the family and the state, as they deal with modern public democracy (i.e. hospitals, schools, public administration) and family needs" (Andreotti et al. 2001, 51).

A Rapid Public and Private Revolution: but a Stop and Go Process

The threats to the future of the Southern European welfare system were clearly exposed almost twenty years ago. Martin Rhodes put it this way already in 1996:

> "The coming years will be critical ones for the southern European countries, as they adjust their economies, administrative cultures and welfare states to pressure from beyond their borders – including the consolidation of the single market, EMU[6] convergence and greater competition in more open world markets. To some extent, these pressures will lead to greater conformity, in terms of budgetary disciplines, the rationalization of bureaucracies, the reduction of clientelism and attacks of anomalies in taxation and benefits … None of this means that the basic features of the 'southern syndrome' will disappear over night " (Rhodes 1996, 19).

Taking the current economic indicators, looking at the present situation in Greece, Spain or Portugal, it seems that the threat is just becoming a reality. But such a shortcut would minimize the enormous demographic, sociological and economic changes that occurred in the meantime, between the end of the nineties and the financial crisis of 2008. Taking these changes into account, we could consider more the half-full rather than the half-empty glass and insist on positive aspects like the adaptability and the capacity to recalibrate the Southern welfare systems.

Indeed, many major reforms were adopted and implemented in the meantime: reduction of the generous guarantees (especially in the field of pensions) for the privileged occupational groups; improvement of minimum income and social benefits; adoption of safety-nets; expansion of childcare and elderly care services to support families; development of family

[6] Economic and Monetary Union criteria.

policy measures that were almost inexistent previously (like parental leaves, for example) ; promotion of gender equality; measures against the black economy (that previously represented between 15 to 30% of the GDP) and tax evasion; reform of labor market legislation; development of social dialogue in industrial relations; rapid tertiarization of the labor market; reduction of self-employment, etc. Thus, despite their characteristics and handicaps, Southern European countries have changed radically.

Maurizio Ferrera recently confirmed this process of change: "Welfare state building has followed a distinct path, characterized by weak Fordism, dualistic social insurance, and faulty and fragmented social assistance. However, under the spur of European integration, the 1990s and 2000s have witnessed substantial efforts to recalibrate and further modernize the welfare state, with the view to achieving more efficient and equitable labor markets, more sustainable and internally more homogeneous social insurance systems and a more effective and inclusive safety-net" (Ferrera 2010, 627).

And, in parallel, public opinion about family life but also about family practices has changed drastically (Moreno and Mari-Klose 2014). Once again, it is not a process of change per se, just coming from the inside of the family. Family change and modernization are directly connected to the transformation of the labor market but also to educational attainment: increase in literacy rates; rise of the number of university graduates, development of women's employment rates; development of the number of bi-active households in accordance with EU norms and incentives and centrally generational change. And this evolution impacts feed-back on the Southern welfare state model deeply, generating new demands and expectations, new claims but also disappointments.

Looking at the Southern Europe employment model, Karamessini argues: "From the beginning of the eighties onwards, a transition towards a dual-earner family model can be identified accompanied by a spectacular upward trend in female activity and employment" (Karamessini 2008, 522). Indeed female employment rates increased in the four main Southern European countries: from 40% in 1983 to 60% in 2007 in Greece; from 38,8% to 59,3% in Italy; from 58,8% to 75,3% in Portugal and from 29,4 to 63,7% in Spain. These changes still vary between countries (more effective in Spain and Portugal than in Italy and Greece) and of course also between regions. When comparing the changes in Italy and Spain, Naldini and Jurado (2012) argue, for example, that "Spain is moving towards a dual earner family model, while in Italy the family kinship solidarity model is still prevalent". Moreno also argues that the Spanish welfare state already followed the 'Nordic path' (Moreno 2008).

These changes during the nineties and the first decade of the 21th century, compared to Western Europe, indicate a clear convergence. We can even argue that this process of modernization is close to the one that characterized many other Western and even Nordic countries at another phase of their respective development and modernization. The process is unique, but the track, the pace, the direction and the conditions of this transformation vary depending on the countries, from the core of capitalism to the semi-periphery of it. The challenge nowadays concerns the impact of the economic crisis on this deep generational change. As Luis Moreno and Pau Mari-Klose put it: "Since recent times, the Mediterranean welfare regime, and in particular its capacity to perform as a social 'shock absorber' and a generous supplier of welfare activities in the informal domain, is facing challenges generated by new lifestyles and emerging social needs of young generations" (Moreno and Mari-Klose 2014, 494).

Lessons from the South

One of the main lessons of this discussion about welfare state ideal-types is certainly the complex interaction between familial protection versus state and collective protection, i.e. "the balance sheet of the critical nexus between family and welfare" to use Ferrera's terms. Recent events and official reports underline this balance shift between state, market and family. Just to give an example: "The 'White Paper on Welfare' issued by the Italian Labor Ministry in mid-2009 clearly resonates the retrenchment of public provision by stressing that 'the current balance between state, market and family should be shifted in favour of more market, more family, and less state'" (Petmesidou 2013, 191).

The financial crisis since 2008 has amplified this challenge. And we argue that in such a context, Southern Europe's experience (i.e. Italy, Spain, Portugal and Greece), with this stop and go process, could be a guideline for learning, not only for many other Southeastern countries (such as Romania, Bulgaria, Albania, Croatia, Macedonia and even Turkey), which share many similarities with their Southern counterparts,[7] but also for the rest of Europe confronted with the development of "new social risks", which don't fit with the anterior social pact and the insurance mechanism built up after the Second World War.

But one can also consider that the Southern European experience could be helpful in considering the huge transition that most if not all European welfare systems are facing in order to adapt themselves to what has been called "new social risks". Peter Taylor-Gooby defines theses new risks as: "the risks that people now face in the course of their lives as a result of the economic and social changes associated with the transition to a post-industrial society" (2004), for example, supporting a frail elderly parent in a context of rapid aging of the population; long-term unemployment and long-standing exclusion from the labor market; raising children as a single parent; difficulties in conciliating work and care, etc. All European welfare systems are confronted with these new social risks and the adaptation or recalibration of the previous welfare systems is difficult everywhere.

For example, most European countries are developing long-term care policies and in particular "cash for care" schemes with different ways of financing (payroll taxes, taxes, private insurances) and also with the recourse to informal care work and sometimes development of a migrant workforce (Bettio et al. 2006; Le Bihan et Martin 2010 and 2012; da Roit and Weicht 2013). The rapid aging of the population and the considerable increase in fragility and vulnerability of the 'older olds' are challenging our welfare systems.

Gender and generational inequalities are becoming main issues in this respect and it seems quite obvious that the previous system of actors and interest groups (social classes, professional corporations) which were managing the 'old social risks' are not used to these new challenges and it seems difficult to identify a new set of actors capable of representing the new population's needs and claims. Moreover, such inevitable reforms are challenging all the welfare systems which are used to social agreements and the issue of decommodification when the new challenges impose the consideration of recommodification and flexibility.

[7] Ferrera is defending such a position concerning the Southast of Europe when he argues: "Given many similarities, it can be suggested that South-Eastern Europe is likely to embark upon a path to welfare state building which will bear many resemblances with that followed in the past by Greece, Italy, Spain and Portugal (probably in this order)." (Ferrera 2010, 628).

In their process of change, we argue that Southern European countries have at least demonstrated important capacities of adaptation and that many lessons could be learned from their situation. Taking just an example of the way we could use this debate to analyze another national case, let's turn to the French configuration. According to Philip Manow's perspective, France is clearly one of these Southern countries. The current political and media scene gives many examples to confirm this diagnosis: weakness and unpopularity of the current social-democratic government caught between a growing extreme-right movement, a radical shift to the right wing (*droitisation*) of the French population, and victim once again of the split of the left; or the radical Catholic mobilization against same-sex marriage used to reactivate the war between church and state. So, according to Manow's perspective, economically, politically France seems to run on the Southern track. But, of course, the pace of this movement is still uncertain. The balance sheet between state and family is very different from other Southern European countries, as the state is still supporting households with public services, at least in childcare. But this equilibrium is unstable and France could be obliged to prove its resilience in case of accentuation of the economic crisis and rise in unemployment; one of the worst indicators being the level of youth unemployment and the not-held promise of the current President of the French Republic to give priority to young people in his political agenda – a promise which must be kept before the end of the Presidential mandate in 2017.

Following Moreno and Mari-Klose, we argue that all European countries are involved in this paramount mechanism for prompting social change: the succession of generation. As they put it for the South: "The long-standing claim that the family remains the Alpha and Omega institution shaping all prospective scenarios for Southern European welfare is being shacked by unforeseen 'collective impulses' of a new generation". (Moreno and Mari-Klose 2014, 511). Let's keep in mind the role of the generational variable in analyzing the next step for Europe.

Finally, this Southern European welfare model discussion, which complements many other lines of reflection about Southern European specificities seems to be heuristic. Not confusing ideal-types with reality, we recognize the crucial inputs of this discussion and its capacity to help us to understand a complex process of transformation. Even if it is nowadays less important to confirm or not the permanence of the Latin rim regime, this discussion and concept were clearly helpful all along the last three decades in conceptualizing the transition and the process of change. Isn't it precisely the finality of concepts that temporarily help us to think and understand reality? But it is also true that these concepts or questions have to be regularly adapted or revisited in order to follow the process of social change we want to understand (see Castel and Martin 2012).

Works Cited

Abrahamson, P. (1999). The Welfare Modeling Business. *Social Policy and Administration,* 33:4, 394-415.

Andreotti, A., S. Marisol Garcia, A. Gomez, P. Hespanha, Y. Kazepov,,and E. Mingione (2001). Does a Southern European Model Exist? *Journal of European Area Studies*, 9:1, 43-62.

Baglioni, S., and L. F. O. Mota (2013). Alike but Not Alike: Welfare State and Unemployment Policies in Southern Europe. Italy and Portugal Compared. *International Journal of Social Welfare*, 22, 319-327.

Bettio, F., A. Simonazzi, and P. Villa (2006). Change in Care Regimes and Female Migration: the 'Care Drain' in the Mediterranean. *Journal of European Social Policy*, 16:3, 271-285.

Bonoli, G. (2005). The Politics of the New Social Policies. Providing Coverage Against New Social Risks in Mature Welfare States. *Policy & Politics, 33,* 431-450.

Bonoli, G. (2007). Postindustrialization, New Social Risks and Welfare State Adaptation in Advanced Industrial Democracies. *Comparative Political Studies,* 40, 495-520.

Castel, R. (1995). *Les métamorphoses de la question sociale. Une chronique du salariat.* Paris: Fayard.

Castel, R. (2009). *La montée des incertitudes : Travail protections, statut de l'individu.* Paris: Le Seuil.

Castel, R., and C. Martin (2012). *Changements et pensées du changement. Echanges avec Robert Castel.* Paris: La Découverte.

Castles, F. (1993). *Families of Nations. Patterns of Public Policy in Western Democracies.* Aldershot: Hants.

Crouch, C. (2015). *Governing Social Risks in Post-Crisis Europe.* Cheltenham: Edward Elgar.

Da Roit, B., and B. Weicht (2013). Migrant Care Work and Care, Migration and Employment Regimes: a Fuzzy-Set Analysis. *Journal of European Social Policy*, 23:5, 469-486.

Esping-Andersen, G. (1990). *The Three Worlds of Welfare Capitalism.* Cambridge: Polity Press.

Esping-Andersen, G., D. Gallie, A. Hemerijck, and J. Myles (2002). *Why We Need a New Welfare State.* Oxford: Oxford University Press.

Ferrera, M. (1996). The 'Southern Model' of Welfare in Social Europe. *Journal of European Social Policy*, 6:1, 17-37.

Ferrera, M. (2000). Reconstructing the Welfare State in Southern Europe. In S. Kuhnle (ed.). *Survival of the European Welfare Systems*, 166-181. London: Routledge.

Ferrera, M. (2005). Democratisation and Social Policy in Southern Europe: From Expansion to 'Recalibration'. Draft working document, United Nations Research Institute for Social Development.

Ferrera, M. (2010). The South European Countries. In F. G. Castel, S. Leibfried, J. Lewis, and C. Pierson (eds.). *The Oxford Handbook of the Welfare State*, 616-629. Oxford: Oxford University Press.

Flaquer, L. (2000). Family Policy and Welfare State in Southern Europe. Working paper 185. Barcelona: Institut de Ciencies Politiques I Socials.http://www.recercat.net/bitstream/2072/1280/1/ICPS185.pdf

Flora, P., and A. J. Heidenheimer (1982). *The Development of Welfare States in Europe and America.* New Brunswick: Transaction Publishers.

Gal, J. (2010). Is There an Extended Family of Mediterranean Welfare States? *Journal of European Social Policy*, 20, 283-300.

Hall, P. (1993). Policy Paradigms, Social Learning and the State. The Case of Economic Policy-Marking in Britain. *Comparative Politics*, 25, 275-296.

Hall, P., and M. Lamont (eds.). (2009). *Successful Societies: How Institutions and Culture Affects Health.* Cambridge: Cambridge University Press.

Hall, P., and M. Lamont (eds.). (2013). *Social Resilience in the Neoliberal Era.* Cambridge: Cambridge University Press.

Jones, C. (1993). The Pacific Challenge: Confucian Welfare States In C. Jones (ed.). *New Perspectives on the Welfare State in Europe*. London: Routledge.

Karamessini, M. (2008). Still a Distinctive Southern European Employment Model? *Industrial Relations Journal*, 39:6, 510-531.

Katrougalos, G.S. (1996). The South European Welfare Model: the Greek Welfare State in Search of an Identity. *Journal of European Social Policy*, 6:1, 39-60.

Kersbergen Van, K. (1995). *Social Capitalism. A Study of Christian Democracy and the Welfare State.* London: Routledge.

Kersbergen Van, K. and P. Manow (eds.). (2009). *Religion, Class Coalitions and Welfare States*. Cambridge: Cambridge University Press.

Le Bihan, B., and C. Martin (2010). Reforming Long-Term Care Policy in France: Public / Private Complementarities. *Social Policy and Administration*, 44:4, 392-410.

Le Bihan, B., and C. Martin (2012). Diversification of Policy Measures in the Elderly Care Sector: Towards Greater Flexibility for Care Users? *European Journal of Aging*, 9:2, 141-150.

Le Bihan, B., Martin C., and T. Knijn (2014). *Work and Care under Pressure. Care Arrangements across Europe.* Amsterdam: Amsterdam University Press.

Leibfried, S. (1992). Towards a European Welfare State. In Z. Ferge and J. E. Kolberg (eds.). *Social Policy in a Changing Europe*, 245-279. Boulder: Westview Press.

Lewis, J. (1992). Gender and the Development of Welfare Regimes. *Journal of European Social Policy*, 2:3, 159-173.

Manow, P. (2015). Workers, Farmers and Catholicism: A History of Political Class Coalitions and the South-European Welfare State Regime. *Journal of European Social Policy*, 25:1, 32-49.

Martin, C. (1996). Social Welfare and the Family in Southern Europe. *South European Society & Politics*, Special Issue on Southern European Welfare States, 1:3, 23-41.

Martin C. (2000). Famille et précarité : la protection rapprochée. In M. Joubert, P. Chauvin, F. Facy and V. Ringa (eds.). *Précarisation, risques et santé,* 29-45. Paris: éditions INSERM.

Martin, C. (2003). The Rediscovery of Family Solidarity. In T. Knijn and A. Komter (eds.). *Solidarity Between the Sexes and the Generations. Transformations in Europe,* 3-17. Cheltenham: Edward Elgar.

Martin, D. (1978). *A General Theory of Secularization.* Oxford: Basic Blackwell.

Moreno, L. (1996). Southern Welfare State in Transition: Crisis, What Crisis? Issues for a Discussion, Unpublished paper presented at the Conference on Social Research and Social Policy in Southern Europe, National Centre for Social Research in Athens.

Moreno, L. (2006). Le modèle de protection sociale des pays d'Europe du Sud: Permanence ou changement? *Revue française des affaires sociales,* n.1, 81-105.

Moreno, L. (2008). The Nordic Path of Spain's Mediterranean Welfare. Center for European Studies Working paper series, n.163.

Moreno, L. (2013). Spain's Catch Up with the EU Core: The Implausible Quest of a 'Flying Pig' ? *South European Society and Politics*, 18:2, 217-236.

Moreno, L., and P. Mari-Klose (2014). Youth, Family Change and Welfare Arrangements. *European Societies,* 15:4, 493-513.

Naldini, M. (2003). *The Family in the Mediterranean Welfare State*. London: Frank Cass.

Naldini, M., and T. Jurado (2012). The Institutional Context of Recent Family Changes. Welfare Reorientation in Spain and Inertia in Italy. Working paper for the 10th Annual ESPAnet Conference, University of Edinburgh, September 6-8.

Palier, B. (ed.). (2010). *A Long Goodby to Bismarck? The Politics of Welfare Reforms in Continental Europe.* Amsterdam: Amsterdam University Press.

Palier, B., and C. Martin (eds.). (2008). *Reforming the Bismarckian Welfare Systems.* Oxford: Blackwell.

Petmedisou, M. (2013). Southern Europe. In B. Greve (ed.). *The Routledge Handbook of the Welfare State,* 183-192. Oxon: Routledge.

Pierson, P. (1994). *Dismantling the Welfare State? Reagan, Thatcher and the Politics of Retrenchment.* Cambridge: Cambridge University Press.

Polanyi, K. (1957 [1944]). *The Great Transformation: The Political and Economic Origins of our Time.* Boston: Beacon Press.

Rimlinger, G. V. (1971). *Welfare Policy and Industrialisation in Europe, America and Russia.* New York: Wiley.

Rhodes, M. (1996). Southern European Welfare States: Identity, Problems and Prospects for Reform.*South European Society and Politics*, 1:3, 1-22.

Rhodes, M. (ed.). (1997). *Southern European Welfare States: Between Crisis and Reform*. London: Frank Cass.

Sapelli, G. (1995). *Southern Europe Since 1945: Tradition and Modernity in Portugal, Spain, Italy, Greece and Turkey.* London: Longman.

Saraceno, C. (2013). Family Policies. In B. Greve (ed.). *The Routledge Handbook of the Welfare State*, 381-390. Oxon: Routledge.

Saraceno, C., and W. Keck (2010). Can We Identify Intergenerational Policy Regimes in Europe?*European Societies*, 12:5, 675-696.

Shalev, M. (2007). Limits and Alternatives to Multiple Regression in Comparative Research. In L. Mjoeset and T.H. Clausen (eds.). *Capitalism Compared*, 261-308. Amsterdam: Elsevier.

Svallfors, S., and P. Taylor-Gooby (1999). *The End of the Welfare State? Responses to State Retrenchment.* London: Routledge.

Taylor-Gooby, P. (ed.). (2004). *New Risks, New Welfare. The Transformation of the European Welfare State.* Oxford : Oxford University Press.

Titmuss, R. (1974). *Social Policy. An Introduction.* London: Allen & Unwin.

Trifiletti, R. (1999). Southern European Welfare Regimes and the Worsening Position of Women. *Journal of European Social Policy*, 9, 49-64.

Van de Velde, C. (2008). *Devenir adulte: Sociologie comparée de la jeunesse en Europe.* Paris: PUF.

Wilensky, H.L. (1975). *The Welfare State and Equality: Structural and Ideological Roots of Public Expenditures*. Berkeley: University of California Press.