FAMILY POLICY AND WELFARE STATE IN SOUTHERN EUROPE

Lluís Flaquer

Universitat Autònoma de Barcelona

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INTRODUCTION

In the last few years Southern European countries have come to the fore as far as the analysis of public policy is concerned. Omitted for a very long time from comparative research, they have recently attracted the attention of students of social policy in so far as they seemingly provided a model featuring in a prominent role a strong and resilient family, which supposedly was a safeguard against social exclusion.

There is no reason whatsoever to exclude these countries from cross-national analysis. Their income maintenance programmes are not vestigial, their welfare states are substantially developed, and their data are no longer reported inadequately (Castles, 1995). They can teach us a lot about the complex relationships between the state, the market, and the family, considered the three cornerstones of the welfare edifice (Esping-Andersen, 1999).

This chapter deals with family policy in Portugal, Spain, Italy, and Greece. The study of family policy is most relevant here because, far from only concerning the area of ‘family policy’, it has a much wider scope. The ‘family question’ is not sectoral, but central in so far as the allocation of responsibilities between the state, the market, and the family constitutes one of the critical features for characterizing various welfare-state models (Martin, 1997).

The question that I am addressing is the following: to what extent can we talk of a family policy model for Southern European countries? In trying to answer this question, I consider family policy in a very broad sense. In my view, not only explicit but also implicit family policy should be taken into account so that the scope of comparison is enlarged. It is useful to examine not only specific measures targeted to families, but also other provisions that indirectly serve an analogous purpose, although their official status may be different. It is possible that categorizations such as ‘family policy’, arising out of a different sociopolitical context, are unable to grasp thoroughly the specificity of Southern European nations. What is to be compared are not individual social policies but whole systems of welfare in which these policies can make sense.

This brings me to a second question: what do we mean by a model? A model must be explanatory rather than descriptive, comprehensive in the sense that it takes into account all relevant factors, and it must specify how their features are reproduced over time. Two main concepts have been suggested to account for welfare similarities and differences among countries as evidenced by contrasting clusters using various criteria, i.e. ‘welfare-state regimes’ and ‘families of nations’. The notion of welfare-state regime rests on the assumption that ‘in the relation between state and economy a complex of legal and organisational features are systematically interwoven’ (Esping-Andersen, 1990: 2). For this approach, in the intellectual tradition of political economy, issues of decommodification, social stratification, and employment are keys to a welfare state’s identity, and the purpose of research is to identify the internal logic underlying their relationships. On the other hand, the scope of the ‘families of nations’ approach is larger than Esping-Andersen’s. ‘Policy similarities between groups and their
differences from other groups may be attributable as much to history and culture and their transmission and diffusion amongst nations as to the immediate impact of the economic, political and social variables that figure almost exclusively in the contemporary public policy literature’ (Castles, 1993: xv). For Castles, although rather similar policy outcomes may be explained in terms of economic, political, and social antecedents, the question of the extent to which those antecedents are themselves conditioned by shared historical and cultural experience must be left open, considering that this kind of legacy may influence to a large extent the present behaviour of those who shape the policies and those who make demands of the state (Castles, 1993).

Even if the theoretical intent of my contribution is modest, the clarification of the model used seems most relevant. Do similar public policy outcomes in Southern European countries result from cultural affinity or from common socio-economic circumstances? Are we endorsing some form of modernization theory, i.e. that economic development, cultural change, and political change go together in coherent and even to some extent predictable patterns, although it is clear that the modernization process is not linear (Inglehart, 1997: 5), or do we believe that values associated with particular societies are quite stable and distinctive and therefore tend to shape social structure? Do social values derive from a matrix of (mainly economic) constraints and opportunities, or from distinct cultural patterns? Is the Southern European cluster to be understood in terms of delayed modernization or in terms of a different path to modernity? If the first part of the sentence is true, Mediterranean welfare states could be described as underdeveloped, rudimentary, latecomers, or traditional. An alternative course of action would be to determine the peculiarities, traditions, or values that uphold their model, if there is one.

The analysis of family policy in Southern Europe seems very appropriate to illuminate such questions because many of these nations' commonalities relate to the family as an institution. They are characterized both by very strong family-orientated values associated with a low degree of individualization and by the lack of an explicit family policy as evidenced by a very limited number of family-friendly social provisions. Should we assume that there is a kind of causal circularity between these two terms or that their condition is the result of a peculiar set of socio-economic circumstances?

This chapter is divided into two parts. In the first part, I provide an overview of the general system of social protection of Southern European countries, with a special emphasis on the measures specifically addressed to families, and a brief description of the Mediterranean family system. The second part deals with other aspects of the welfare-state regime such as labour market characteristics and access to housing and concludes with some notes on the reproduction of the system.

WELFARE STATE AND FAMILY IN SOUTHERN EUROPE

Southern welfare states can be described as a via media with respect to other systems of social protection, as they encompass elements of both Bismarckian and Beveridgian traditions (Almeda and Sarasa, 1996; Moreno, 1997). In terms of social protection expenditure as per cent of GDP, all Southern European countries are well below the EU average.1 While in 1996 the EU average was 28.7%, the figures for Greece, Spain, Italy, and Portugal were 23.3%, 22.4%, 24.8%, and 21.6%, respectively. In the
same year, social protection expenditure per capita for these four countries was also below the average. On the other hand, the analysis of the structure of expenditure on social protection benefits by function shows important contrasts not only between Southern countries and the EU average but also among them. Thus, whereas in 1995 the average for expenditure on family and children was 8%, Spain only spent 1%, Italy 4%, and Portugal 6%. Regarding further areas of social protection other peculiarities for Southern countries were apparent. Both Spain and Portugal spent more on sickness and health care, Italy and Greece spent a lot on old age and survivors’ pensions, and Spain’s expenditure on unemployment benefits was exceptionally high, as much as two times the average.

One of the reported characteristics of social security in Southern European countries is its high degree of fragmentation along occupational lines (Ferrera, 1997). This is particularly true in the Greek case. In Greece the system is characterized by a mosaic of insurance funds (236 in 1995), in which eligibility and benefits differ greatly (Symeonidou, 1997; Papadopoulos, 1997). The Italian and Spanish welfare systems also show a considerable measure of fragmentation, while Portugal has the least (Trifiletti, 1998; Guillén, 1997; Ferrera, 1996).

The mix of universalist health-care systems with professional pension schemes is common to all Southern European countries (Guillén, 1997). For some analysts, the Southern type can be treated as a model in so far as it presents an original blend of ‘occupationalism’ (maintenance system) and ‘universalism’ (health service) that is not found in other parts of Europe (Ferrera, 1996). In 1978 a national health service was created in Italy, thereby rendering health care a right for all citizens (Saraceno, 1998). In 1979 a similar system was set up in Portugal, but private medicine continued to develop in parallel with the public service (Guibentif, 1997). Finally, a national health service was instituted in Greece in 1983 and in Spain in 1986 with production and provision of health services based on a public-/private-sector mix (Symeonidou, 1997; Almeda and Sarasa, 1996).

Another characteristic of Southern welfare states is that no national statutory minimum income scheme is guaranteed for individuals and families. There is no national last-resort safety net, although in Spain and Italy, where social assistance is under the exclusive control of regional authorities, some local schemes have been developed with very irregular levels of provision (Trifiletti, 1998; Symeonidou, 1997).

Provisions of explicit family policy

In terms of child benefit packages, the least generous EU member-states are Portugal, Italy, Spain, and Greece (Hantrais and Letablier, 1996; Pringle, 1998). Portugal is the only Southern nation with universal, though modest, family allowances (Ferrera, 1997). Greece has never had an explicit family policy, and family benefits are very low, although large families in particular are protected in many ways (Symeonidou, 1997). Along with Spain, Greece provides one of the least generous child support packages (Papadopolous, 1998). In Italy there is no universal child benefit. Since 1988 there is a so-called benefit for the family nucleus that is payable to low-income employed workers at a level that varies by household composition (Saraceno, 1998). In Spain family allowances, albeit extremely low, were universal until
1990 when they were increased in amount and became means-tested. In the last decade, child benefits have become measures of social assistance in both Italy and Spain.

Maternity leave with full earnings is provided in Portugal, Spain, and Greece. In Italy the benefit is only paid at 80% of earnings, and self-employed working mothers are not covered. The duration of the leave is 16 weeks in Greece and Spain, 18 in Portugal, and 22 in Italy. Greece pays the lowest maternity benefits of all the EU countries (Papadopolous, 1998). I have no data on the take-up of maternity benefits in Southern European nations, but there are some indications that it is quite low. In Southern European countries parental leave is unpaid, except in Italy where 30% income replacement is provided (Pringle, 1998). Length of parental leave varies from 3.5 months in Greece (6 months for lone parents) only for workers in large companies, 6-24 months in Portugal, 9 months in Italy, and 12–36 in Spain (Papadopolous, 1998).

Regarding child-care facilities in Southern European countries, publicly funded day-care provision for under-fours is generally rather low. On the other hand, the levels of provision for 3–6-year-olds are comparable with those achieved by the Nordic states (Pringle, 1998). High coverage in Spain and Italy is due to the fact that provision of day care for 3–6 year-olds is a part of the educational system and that service is therefore free.

The reconciliation between family and paid work is not favoured by the fact that in Southern European nations part-time jobs for women are rare. According to Eurostat data, while in 1995 the EU average for women employed part-time was 31%, percentages for Southern countries were much lower (Greece: 8.4%; Spain: 16.6%; Italy: 12.7%, and Portugal 11.6%).

The paucity of public services for very small children, the lack of cash support for families, and the limited amount of provisions for reconciling family and employment leaves families themselves with the responsibility for dealing with their difficulties. Clearly, the pivotal role of the family in social protection cannot be over-emphasized. In Southern Europe the welfare state is to a large extent the Mediterranean welfare family, with an important share of both material and non-material intra-familial transfers (Moreno, 1997). Considering that in this part of the world the key welfare provider is less the state than the family, let us turn to its main characteristics.

**The Mediterranean family system**

Most sociodemographic indicators show that Southern European nations exhibit a number of unique features. Although the average household size of Mediterranean countries has gradually decreased in the last decade, it is still the highest in Europe (Pringle, 1998). This is largely related to a significant proportion of multi-generational households and to a very limited amount of one-person households. Thus, while in 1995 as a European average 12% of men and 10% of women in the age group 20–29 were living on their own, in Portugal only 2% of men and 3% of women did so; and in Spain only 1% of either sex. Italy and Greece were also well below the mean but closer to it.
A crucial variable is the high proportion of young people in their twenties living with their parents, which in Southern nations is much higher than in other parts of Europe. Thus, for example, in 1996 65% of men and 44% of women in the 25–29 age group were still living with their parents in Spain, Greece, and Italy; in 1986 the proportions for the same age group were 52% for men and 29% for women. This shows the extent to which the situation of young people in Greece, Italy, and Spain has deteriorated in recent times insofar as most of them fail to achieve full social integration as responsible and independent adults (Fernández Cordón, 1997).

However, this complex issue cannot be simply dismissed—as many writers have done—by saying that it is the result of high unemployment rates for young people. It is also related to the peculiar structure of the labour market, to the lack of social provisions for young people, and to a number of family values.

Young people’s dependence on their parents may not only be seen by both as a yoke but also as a valuable asset. It is a useful strategy to maximize children’s resources for their entry into adult life under favourable conditions. Especially in the case of young women, it allows them to make profitable investments in education (Flaquer, 1995). It also helps them to find a good job through personal networks. Thus, in Southern European societies young people more often find employment through their family connections. Whereas a substantial proportion of young people in Southern European countries got a job thanks to their families (69% of Greeks, 65% of Italians, 61% of Spaniards, 58% of Portuguese), only a low percentage of young people in Northern Europe did so (18% of Dutch, 19% of Danes, and 21% of Germans) (Mendras, 1997: 171). Finally, it enables young people to save for the purchase of a home, possibly with financial help from their parents.

As a result of this co-residence of parents and children until the latter marry, in Mediterranean countries rates of non-marital cohabitation are very low, as is the number of children born out of wedlock. With the exception of Portugal, live births outside marriage are well below the European average.

Intergenerational dependency takes place both at the beginning and at the end of the life cycle. Using different indicators, Mediterranean states display above-average composite values for the impact on families of old and young age dependency (Hantrais, 1999: 296). For the age group 75 and over the number of people living on their own in Southern countries is below the European mean. With the exception of Italy, where the proportion of women of 75 years and over living alone was above the mean, in the rest of the Southern countries all percentages for men and women were below the average, with Spain showing very low values. As these data only report household composition, they do not reflect other Mediterranean family arrangements such as kin residential proximity, which is also a distinct phenomenon in this part of the world. Kin clustering is a prerequisite for the collaboration across genders and generations. The delivery of services such as care for children or for the elderly needs some daily interaction, which would not be possible if parents and children did not live close to each other. Needless to say, adult married women are the main providers of these care services and are motivated by a strong sense of moral obligation that fuels the system.

A proper understanding of how this works must rely on the analysis of values underlying the Southern family, which has been variously described as a ‘clearing-house’ (Castles and Ferrera, 1996:
and as a ‘synthesis of breadcrumbs’ (Trifiletti, 1999: 52). As Saraceno puts it, ‘the Italian familist welfare regime is not exclusively nor even primarily based on a strong breadwinner model, but on the family as perceived as a unit of income and resources, to which everyone contributes according to his/her opportunities, although they may differ by gender. What is assumed is not the figure of breadwinner but family solidarity -including kin- and the primary responsibility of women -married and mothers- in the provision of care’ (Saraceno, 1995: 279-80). The function of the Mediterranean family is therefore very different from the classic model of the male breadwinner. The state does not take on the responsibility of guaranteeing a family wage, but it merely allows nuclear or extended families to pursue strategies to ensure that at least one member has a good, secure job (Trifiletti, 1999).

As far as marriage break-up is concerned, rates of divorce and lone parenthood in Southern Europe are quite low. Although it is true that, particularly in Spain and Italy, the divorce rate is not the best indicator of break-up because a significant number of separated people do not have recourse to divorce\(^9\), crude divorce rates in Portugal, Spain, Italy, and Greece are well below the average. This is usually explained by the opposition of the Roman Catholic Church to the dissolution of marriage. However, despite the fact that divorce was traditionally permitted by the Orthodox Church, the Greek rate is also low. This suggests that other factors such as family solidarity and a low degree of individualization should also be taken into account.

One of the outputs of this family system is rather low levels of fertility. While total fertility rates in Greece and Portugal stand at the European mean, the rates in Spain and Italy are the lowest in the world. But if we are to understand this paradox, it is necessary to investigate other aspects of the model.

**IN SEARCH OF A MODEL**

In my view, identifying a model of family policy for Southern European countries should rely less on the analysis of measures explicitly addressed to families and more on the study of other features of the welfare-state regime such as income maintenance systems, labour market provisions, and housing policies.

The specificity of Southern European countries in the field of family policy is not so much to be found in the structure of welfare schemes for families, but in the assumption that families are crucial in providing support and services for dependent people. On the face of it, it may seem a contradiction that a system in which the centrality of family is so obvious has not developed a fully-fledged family policy. But looking into it more closely, the connection between the two terms becomes obvious. As Esping-Andersen puts it, ‘familialism easily goes hand-in-hand with a very passive and undeveloped family policy’ (Esping-Andersen, 1999: 51). Southern family policy, through its inaction, implicitly nurtures and reproduces the ideological assumption that the family is the main provider in society (Papadopolous, 1998). But this assumption is not only emphasized in a negative way through family policy. It is also reinforced by means of other elements of Southern welfare regimes that influence the shaping of family structure to an even larger extent. In the next two sections I will delve into the structure of the labour market and into housing policy in order to give a few examples of this effect.
The structure of the labour market

One of the characteristics of the Southern socio-economic model is the prevalence of an illicit economy. Estimates of this hidden informal sector in Southern European countries range from 15 to 30% of GDP (Ferrera, 1997; Moreno, 1997; Cousins, 1999). This feature is connected with a high percentage of tax evasion, which creates a very uneven distribution of financial burdens across various occupational groups. All in all, salaried workers are typically more heavily taxed because being under a pay-as-you-earn scheme they cannot avoid paying a single penny in taxes. This reveals a deficit of ‘stateness’, which is reflected in a weak state penetration of welfare institutions (Ferrera, 1996).

This kind of informal economic arrangements is apparent from the structure of employment. In Portugal, Spain, Italy, and Greece the proportion of self-employed and family helpers in 1998 was well above the European average. Greece was an extreme case with more than one-tenth of workers being employed by their families and one-third being self-employed. The low percentage of salaried workers in these countries is evidence that the cash nexus has not fully replaced family solidarity and that the process of commodification is far from completed.

One of the labour market characteristics that has more often attracted the attention of researchers is the low rate of female economic activity. With the single exception of Portugal, which in most respects shows an outstanding performance on the labour market, the rest of Southern nations have the lowest rates in Europe, 8-10 percentage points below the average. This feature, in conjunction with heavy female unemployment, produces very low employment rates for women.

Different levels of participation of men and women in the labour market are coupled with specific work opportunities in terms of sex. Differentials between male and female unemployment rates in Greece, Italy, and Spain are huge. I have calculated the gaps between men’s and women’s unemployment rates in 1997 using Eurostat data: not only were they the largest in Europe in these three countries, but in Greece and Spain they had widened in the last decade.

In the case of men and women under 25 disparities concerning unemployment are still more apparent. Youth unemployment rates for Portugal, Spain, Italy, and Greece are much higher than rates for the overall active population, and the gap between males and females is considerable. For example, while the average rate in Greece was 10.3%, the rate for young males was 22.2% and for young females 40.6%. In Italy the respective figures were 12.2%, 29.1%, and 39.3%, and in Spain 20.6%, 30.3%, and 46.1%. I have not been able to find comparative data on unemployment rates of male family heads, but data for Spain indicate that they are nearly half the rates of the whole active population. This situation sharply contrasts with that of countries such as Germany or the UK where unemployment rates for household heads are much higher than those for dependants. What is more, in Greece, Italy, Portugal, and Spain, heads of households are the least likely to be long-term unemployed of any of the major European countries (Cousins, 1999). This would mean that Mediterranean labour markets tend to discriminate in favour of male family heads and against women and young people.
This discrimination is reinforced even more by the different rate of coverage of unemployment benefits for various family status categories. For example, in Spain unemployed people without any previous work record, most of whom are young people and women, are not entitled to contributory benefits. Moreover, only those who are eligible for these benefits can receive further benefits under the principle of social assistance (Cousins, 1999). My own calculations on different coverage rates of unemployment benefits in this country show that while coverage for males is quite high, coverage for women and young people is much lower10.

In conclusion, one of the main characteristics attributed by most analysts to Southern welfare state regimes is a very marked dualism (Ferrera, 1996, 1997; Moreno, 1997; Pringle, 1998; Trifiletti, 1998). This concerns not only the structure of income maintenance systems but also the organization of labour markets. While some core sectors of the labour force are provided with acceptable protection against redundancy and unemployment, the remaining workers are left with little or no shelter at all. In particular, whereas male family heads are well protected against unemployment, most women and young people have very precarious labour contracts. Southern European countries have segmented and rigid labour markets that set up a divide between insiders and outsiders. The insider/outside problem may be defined as a situation in which collective negotiations are conducted solely on behalf of those with jobs, pursuing wage maximization at the expense of job expansion for outsiders. One of the consequences of this structure is that it is extremely difficult for outsiders to gain access to jobs. When jobs become scarce goods, they take on the character of an asset, of which the have-nots will feel deprived (Esping-Andersen, 1990: 227). This is only possible because most people, including the government, the employers, and the unions, feel that in a situation of scarce employment, jobs should be mainly reserved for male family heads.

The theory of insiders/outsiders has been used to explain the persistent high unemployment levels in Spain (Bentolila and Dolado, 1994; Cousins, 1999), but it is also apt to describe the privileged position of family heads in the labour market and the corresponding exclusion of women and young people, which contributes to the upholding of the patriarchal features of Mediterranean welfare systems (Pringle, 1998). While male family heads are getting the lion’s share of the welfare state benefits, young people and middle-aged women are bearing the brunt of unemployment. As Esping-Andersen puts it, ‘The high wages and job security enjoyed by (chiefly male) insiders, in effect, are also what causes the exclusion of their sons, daughters, and wives’ (Esping-Andersen, 1999: 153).

Spain is an extreme case in which fixed-term contracts now affect about one-third of the workforce, particularly women and young people, and virtually all the new entrants to the job market (Cousins, 1999)11.

Housing policy

Home-ownership may be considered a primitive form of insurance against social risks (Trifiletti, 1998). One of the more prominent features of Southern European welfare systems is a tacit encouragement for this kind of provision, which is often upheld by a virtual lack of social housing12 and considerable tax incentives for the purchase of dwellings. It is true that the growth of home-ownership has
been commonplace in many developed countries in the last decades. However, it may seem a paradox that the countries in which we can find the highest proportions of owner-occupied housing are the familistic Mediterranean societies rather than Northern societies characterized by privatism and individualism (Castles and Ferrera, 1996).

In Greece, Spain, and Italy the percentage of owner-occupied dwellings is about 20 points above the average, but in Portugal it is much closer to the European mean. On the other hand, growth in the levels of home-ownership between the early 1960s and early 1990s in Southern European countries was above the OECD mean. The highest rates of growth were found in Italy and Spain with an increase of 22 and 25 percentage points, respectively (Castles, 1998).

In Spain, for example, subsidies granted to property owners through tax relief are of considerable importance. If we set the cost of tax expenditure for home-ownership against the expenditure of social housing, the result is that the former is about 2.5 times the latter. In Italy, where access to housing can be called the Cinderella of social services, home-ownership is induced through various kinds of tax relief and reduced mortgage rates for civil servants and young people (Sanzeno, 1998). In Greece the spread of home-ownership has been encouraged by rent-control and state land policies, coupled with loan facilities for civil servants and tax relief. It must be taken into account that, even if dowries as a legal requirement for marriage were abolished in 1983, they continue to exist in practice and are usually paid in the form of real property. For Greeks it is very important that their children should be settled in terms of jobs and marriage. They go to great lengths not only to educate their children, but also to provide them with houses. The fact that both education and home-ownership are considered as a kind of a fetish demonstrates the extent to which the family substitutes for the welfare state in Greece (Symeonidou, 1997).

The insistence on, and the significance of, home-ownership in Mediterranean nations can be interpreted as a form of family self-protection in the face of an absence of universal child benefits and a very limited coverage of social services. Owning property may be an important asset in countries where the safety net is very deficient and where family allowances are poor. Home-ownership may be seen both as an investment against social risks and as an ecological resource allowing kin to build up solidarity networks able to provide care facilities in case of need. Residential stability becomes a value in itself, very often associated with community roots or with kin propinquity. Although the effects of high rates of home-ownership percolate through the generations because Mediterranean family arrangements very often imply exchanges of cash and services, nevertheless this can create an unfair distribution of housing resources, with the young having difficulties starting a family and old people being well off. This imbalance has been exacerbated by the fact that in countries such as Italy and Greece there has been a massive expansion of home-ownership coupled with an increase in old-age pension spending in recent decades. This defies the logic of the trade-off between them in the sense that the former constitutes a private alternative (albeit often publicly subsidized) to long-term saving for old age. Such a distribution of resources across generations, which is peculiarly skewed in favour of the old, is very detrimental to family formation and contributes to a falling birth rate (Castles and Ferrera, 1996). But it also has important consequences for vertical equity in so far as families that have managed to accumulate property will transfer it through inheritance to the younger generations. The longer life expectancy means that
nowadays the transfer goes from grandparents to grandchildren rather than from parents to children as before. Although thanks to the drop in the fertility rate many grandchildren will inherit some property, this will leave those whose parents or grandparents could not acquire real estate relatively worse off and it might create the conditions for social conflict in the future.

The reproduction of an implicit model

The nations of Southern Europe have followed a specific path to modernization (Ferrera, 1997; Giner, 1982; Malefakis, 1992). In particular, many writers stress the significance of the legacy of authoritarian political regimes, especially in the case of Portugal, Spain, and Greece (Rhodes, 1997a; Symeonidou, 1997; Valiente, 1997b). Dictatorships in these countries have not only meant a heavy deficit in the construction of a fully democratic polity, but also, especially in the Spanish case, they may have brought about a strong backlash against family policy as one of the most cherished symbols of Fascist regimes.

Finally, the hegemonic influence of the Roman Catholic Church in delaying the modernization process has been emphasized for the Portuguese, Spanish, and Italian experiences (Esping-Andersen, 1999; Moreno and Sarasa, 1993; Picontó-Novales, 1997). Not only did the Catholic Church, frequently in alliance with the more conservative political forces, act as a brake on the development of the welfare state to the extent that it was regarded as a potential competitor against religious welfare institutions, but it also tended to shape the ideology of the population by means of the widespread dissemination of its social teachings. One of the domains for which this influence was exerted with more emphasis was the family as an institution, in that its constitution and regulation was seen by the Catholic Church more as part of the moral order than under the state’s authority.

One of the better-known labels applied to Southern welfare systems is the ‘rudimentary Latin model’ or ‘Latin rim regime’ (Leibfried, 1992). In my view, such descriptive characterizations are not particularly helpful for understanding their underlying logic, since the implication that their more distinct feature is falling short of Northern European standards often means imposing alien categories of thought on a very dissimilar reality. On the other hand, both Katrougalos (1996) and Esping-Andersen (1999) consider Southern welfare systems as a subtype of conservative corporatism. However, at least as far as the analysis of family policy is concerned, I do not find it very useful to put in the same box cases such as France, Belgium, or Germany, with a long tradition in institutional family policy, and Mediterranean countries such as Spain, Italy, or Greece where there is a virtual lack of support and services for families.

For one thing, the structure of the labour market as described above is strongly associated with a lack of reconciliation between family and employment. The combined effect of weak female participation in the work-force, a low rate of female salaried employment (as a result of high female unemployment and a low rate of salaried employment), and segregation of the labour market by sex is the low proportion of women among union members. Not only is casual and non-standard employment more frequent among women than among men, but the proportion of formally employed female core workers among the total of employable persons is low. This reinforces traditional roles of men and women and upholds the patriarchal principle by which males tend to prevail in the public domain while the maintenance of family
solidarity and the provision of care services are allocated to females. One of the consequences of this situation is that Southern labour unions are male-dominated. Therefore, men’s interests seem to hold sway, while the family dimension is usually ignored. This gender bias of labour unions may help explain why they are not pressing for measures to reconcile family and work and why, considering that family issues are not at stake, women are treated as workers rather than as mothers in employment policy.

In my opinion, in trying to account for the distinctiveness of Southern Europe it may be helpful to look at the way in which the system is reproduced. What seems to be *sui generis* in Mediterranean countries is that there is a circularity between a lack of family policy measures and an absence of demand for such measures. As in a sort of self-fulfilling prophecy, the outcome of a passive family policy is that difficulties faced by individual families are not tackled via public mobilization but through people’s private strategies. This creates a kind of negative feedback situation in which the system is reproduced and even reinforced. In Southern European countries, family solidarity both explains and is the result of an undeveloped family policy. Responses given to new challenges such as a higher participation of women in the work-force are not articulated through explicit public policy but draw on private kin resources. One of the results of this state of affairs is the upholding of patriarchal relationships and in general the reinforcement of the family as a central social institution, despite the fact that this may clash overtly with politically correct official statements on equal opportunity for both sexes.

With the clear exception of Portugal, Southern European countries have come to an equilibrium where low female participation in the labour market and low fertility mutually reinforce each other. The prevalence of family networks involving an exchange of assistance has inhibited the externalization of female labour-intensive services (Bettio and Villa, 1998). This vicious circle could be broken by increasing labour supply through the creation of jobs involving care services in the public sector, following the Nordic model (Esping-Andersen, 1999). But social and political actors do not seem to have favoured such a solution because in Mediterranean countries most people think that family services are superior in quality to those offered by the state and that therefore things should be preserved as they are.

One of the prerequisites for this system to be operative is a very strong familistic ideology in the sense that there is a widespread consensus on the matter that nobody calls into question. Clearly, we can find a broad tacit consensus among the population that this is the right way to deal with family issues. Thus, a family-centred welfare system, a family-biased production system, and a family-orientated value system go hand in hand. Such an ‘economics of the family’ cannot work unless it is sustained by a set of widely shared cultural values. This is why I think that, if we want to have a proper understanding of how the system works and is reproduced, it is necessary to introduce the variable of culture at some point in the explanation.

Returning to the question addressed in the introduction, my view is that both approaches, ‘regime-types’ and ‘families of nations’, may be valid, but I suggest that the second one is better to account for Southern peculiarities. This suggestion derives from my contention that Mediterranean family values have a central role in the reproduction of the Southern welfare regime and that consequently they must be given a prominent part in any theoretical attempt at interpretation. All in all, the main difference between these two approaches is whether culture is used as a dependent or as an independent variable. I
would like to argue that, even if in the long term culture can undoubtedly be considered a dependent variable in so far as it tends to be shaped by structural and institutional constraints and opportunities, in the short term it may also act as an independent variable that contributes greatly to the reproduction of the model.

In Southern European countries it is possible to speak of a model of family policy to the extent that it is implicit. I mean implicit in the sense that it is the result of mostly uncoordinated responses from the state administrations to various social policy areas on the assumption that it is up to the family to protect itself and that at any rate public policies must be designed to foster kin solidarity. Unlike health care, old-age pensions, and education, which were defined as a national priority and where there was a strong political will to promote nearly universal coverage, family policy has not yet found its way onto the political agenda.

In my view, if we can argue for a Southern model of family policy, it is because most of the features discussed above, which can be thought of as Mediterranean commonalities, do not just belong to the traditional past of these societies but were developed in the period of expansion and consolidation of welfare states in this part of the world. They were the outcome of specific responses given in these countries by various governmental institutions, social and political agents, and citizens in general to problems resulting from the modernization process.

Thus, the high degree of segregation by sex and age and the insider/outsider divide in Southern labour markets was the result of post-industrial transition in the face of a massive entry of women into the work-force. This was the catalyst that at the beginning of the 1980s caused the widening of the gaps between the unemployment rates of household heads and other family status categories\textsuperscript{16}. By the same token, the trends towards co-residence of young people with their parents before marrying in their late twenties and towards young women’s heavy educational investments are quite recent phenomena\textsuperscript{17}. On the other hand, the dramatic increase in home-ownership in Mediterranean countries during the last forty years took place at a time when the basic framework of their welfare states was being built, and this development seems to correspond to a deliberate option. Finally, the drop in fertility, more pronounced in Spain and Italy than in other Southern European countries, may clearly be seen as one of the most prominent unintended consequences of the operation of this system. In this case, private virtues, i.e. kinship solidarity, are producing public vices.

CONCLUSION

For one thing, Southern European countries exhibit both similarities and differences. Italy has a longer democratic experience than the rest of the Southern nations. In Spain the rate of unemployment seems most extreme, while Italian old-age pension levels are very generous by European standards. Portugal departs radically in many respects from its Southern neighbours, in that it has a very high female activity rate, a universal family allowance system, and a benefit for young unemployed persons living on their own (Ferrera, 1996). This is why I have sometimes used the expression ‘Mediterranean family policy’ to highlight the commonality of Spain, Italy, and Greece compared to Portugal.
One of the main differences between Southern European countries and other nations of the conservative regime type, both labelled by Esping-Andersen (1999) as ‘familialistic’, is the extent to which they have explicit family policies. 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 very limited amount of family-friendly public measures. The deficit in Southern welfare systems is not so much the result of a low decommodification level but of a low defamiliarization level. This is in accordance with the logic of the system because placing the burden of welfare responsibility on the household is only possible if one section of the population, i.e. married women, does not have access to cash benefits. This creates a situation of mutual dependency of men and women in which the former provide income and the latter care services. This symbiotic relationship explains why family ties are so strong in Southern European countries.

I would like to leave as an open question the future prospects of the Mediterranean model. As I have already said, it can be construed as resulting from a specific strategy of modernization. As such it could be a transitional, short-lived arrangement associated with this particular path to modernity. Even if a complex set of values is fuelling the reproduction of the system, it might well be that some of its more dysfunctional consequences challenge its validity and prompt its adaptation to new conditions. In particular, the increased participation of women in the labour market puts a heavy strain on the system as they find it more difficult to reconcile their job with their care responsibilities. This is why one of the crucial variables for the survival or death of the model is the strength and the position of the women’s movement in searching for alternative political proposals and welfare reforms.

Abstract

The purpose of this chapter is to identify the most prominent features of a family policy model in Southern European countries. The main contention is that such a model must not be sought in the explicit measures regarding the strict field ‘family policy’, but in the main characteristics of Mediterranean welfare regimes, including a heavily gender-biased labour market, a widespread prevalence of home-ownership, and a set of widely shared family-orientated values that contribute to its reproduction. While a low rate of female employment is probably associated with a lack of family-friendly provisions, the model is reproduced because care services within the family are not externalized to the market. This not only inhibits tertiarization, but also hinders demands for family policy measures from the welfare state.
NOTES
1. Eurostat, ESSPROS system, GDP at market prices, 1996.

2. Data for Greece were not reported in that year but earlier Eurostat data indicate that they were close to those for Spain.

3. Escobedo (1999) reports that in Spain only one-third of mothers giving birth receive the maternity benefit.

4. In Portugal the 6 months basic leave period may be extended in the case of the birth of a third or higher order child. In Spain during the first year the employee is entitled to return to his/her former job. Otherwise, he/she is only entitled to return to a job of the same level (Moss and Deven, eds., 1999).

5. The coverage is as follows: Greece: 70%; Spain: 84%; Italy: 91%; Portugal: 48%.

6. Eurostat data.

7. In Southern European societies marriage, usually in the church, is construed as an act of social emancipation and is therefore seen as the proper step preliminary to family formation.

8. According to Eurostat data, in 1995 the EU average of live births outside marriage was 23%, compared to 3% in Greece, 8% in Italy, 11% in Spain, and 19% in Portugal.

9. In the legal system of these countries being judicially separated is a precondition for divorce but court proceedings may conclude at the stage of separation.

10. According to my own calculations using data from the Spanish Labour Force Survey, the average rate of coverage of both contributory and non-contributory benefits for the estimated unemployed was 37%. In contrast, the rate for men was 47%, for women 29%, for the age group 16-19 3.5%, for the age group 20-24 13%, and for the age group 25-34 34%.

11. In 1998 the European percentage of employees with fixed-term contracts was only 12.6%. Percentages for Southern European countries were the following: Portugal: 17.3%; Spain: 32.9%; Italy: 7.4%; Greece: 11.8%.

12. With the notable exception of Portugal.

13. According to Eurostat data (1994), the European average was 59%. By contrast, the Spanish rate was 79%, the Greek and Italian ones 77%, and the Portuguese one 61%.

14. Own calculations using Spanish statistical sources.

15. This model not only departs from the traditional inverse relationship between female participation and fertility, which appears to have broken down in the Western industrialized countries, but also from the positive relationship between both phenomena that has recently emerged in these nations.

16. For example, in 1985 the gap between the unemployment rate for males and females in Spain was 4.8 percentage points; in 1987 it had risen to 10.4 (Flaquer, 1995).

17. In 1980 the rates of schooling for males and females aged 15-19 and 20-24 were similar. At the beginning of the 1990s there was a gap of about 10 percentage points.

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