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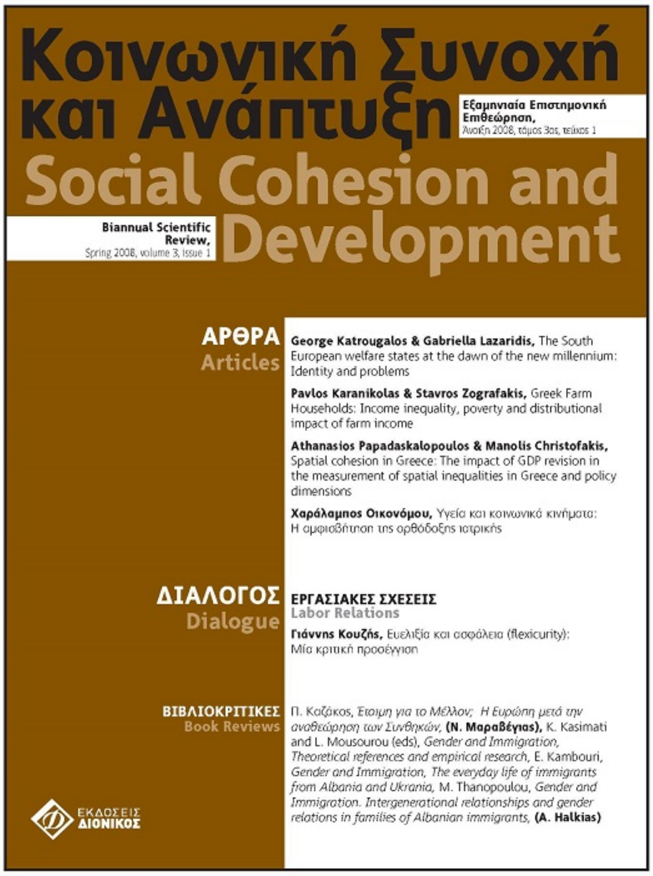

The South European welfare states at the dawn of the new Millennium: identity and problems

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The South European welfare states at the dawn of the new Millennium: Identity and problems

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Τα κράτη πρόνοιας της Νότιας Ευρώπης στην αυγή της νέας χιλιετίας: Ιδιαίτερα γνωρίσματα και προβλήματα

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ABSTRACT
The present paper examines the identity of the "South European" deviation against classical typologies. Against this background, the argument presented some years earlier by Katrougalos and Lazaridis (2003) is revisited, bearing in mind later contributions in the field as well as recent data. The article then proceeds by presenting the main traits of Southern European states, arguing that they all share the basic characteristics of the "state-corporatist" welfare model. Nonetheless, important differences can be discerned among them, while some seem to share more common features with France than with the other members of the Southern cluster. These differences are in turn attributed to their historic traditions, and in particular the dissimilar weight of patronage and clientelism.

KEY WORDS: Welfare state, Southern Europe, Italy, Spain, Greece, Portugal

ΠΕΡΙΛΗΨΗ
Το παρόν άρθρο εξετάζει τα ιδιαίτερα γνωρίσματα της «νοτιο-ευρωπαϊκής» απόκλισης υπό το πρίσμα των κλασικών κατηγοριοποιήσεων των κρατών πρόνοιας. Στο πλαίσιο αυτό, επανεξετάζεται το επιχείρημα των Katrougalos & Lazaridis (2003) λαμβάνοντας υπόψη μεταγενέστερες θέσεις και τα πρόσφατα δεδομένα. Ακολούθως παρουσιάζονται τα βασικά γνωρίσματα των κρατών της νότιας Ευρώπης. Υποστηρίζεται ότι το σύνολο των κρατών αυτών χαρακτηρίζεται από τα βασικά χαρακτηριστικά του «κρατικού-κορπορατιστικού» προνοιακού μοντέλου. Την ίδια στιγμή εμφανής είναι η ύπαρξη σημαντικών διαφορών μεταξύ τους σε σημείο που κάποια από τα κράτη αυτά να εμφανίζουν περισσότερα κοινά χαρακτηριστικά με τη Γαλλία παρά με τα λοιπά μέλη του νοτιο-ευρωπαϊκού μοντέλου. Η ύπαρξη των διαφορών αυτών ανάγεται στις διαφορετικές ιστορικές παραδόσεις και ειδικότερα στο διαφορετικό ειδικό βάρος των πελατειακών σχέσεων.

ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ: Κράτος πρόνοιας, Νότια Ευρώπη, Ιταλία, Ισπανία, Ελλάδα, Πορτογαλία

1. The institutional identity of the South European welfare states

1.1 The argument for a "Southern European welfare state"

It is not until recently (mid-1990s) that the academic debate started dealing in more detail with the study of the 'South European welfare state'. A number of authors have suggested the existence of a distinct Latin-Rim (Leibfried, 1993), Mediterranean (Bonoli, 1997) or semi-peripheral welfare state (Santos, 1994; Hespanha, 1999, Marinakou, 1998), comprising Greece, Italy, Portugal and Spain. However the more influential argument about a Southern European Welfare State has been proposed by Ferrera. Initially, Ferrera (1993) has proposed a classification of welfare states based on the coverage of social protection schemes and the differentiation between universal and occupational coverage. He has suggested four types of classification, occupational pure, occupational mixed, universalistic pure and universalistic mixed models. There is a strong point in this line of thought, as it helps to identify winners and losers in different welfare systems, especially with regard to insiders and outsiders of the market (cf. also Bonolli, 1997). In this typology, Italy, the only Southern European country analytically examined, is classified together with Switzerland and Netherlands in the "mixed occupational model".

However, in more recent works (Ferrera, 1996, 1997, 1999, 2000, 2005), he and others following his argumentation (Rhodes, 1997), have proposed a distinct Southern European model, with main characteristics:

A) A highly fragmented and "corporatist" income maintenance system, displaying an internal polarization: peaks of generosity for privileged strata of the population coexist with important gaps in protection.
B) A low degree of state penetration of the welfare sphere and a highly collusive mix between public and non public actors and institutions[1].
C) The strong influence of the Catholic Church.
D) The persistence of clientelism and the formation of elaborated "patronage machines" for the selective distribution of cash subsidies. (Ferrera 1996, p. 17ff, p. 20ff),
E) A differentiation from the corporatist traditions in the field of health care and the establishment of National Health Services based on universalistic principles.
F) The lack of an efficient, rational, Weberian type administration and the weakness of civil society (Niero, 1996, p. 118; Ferrera, 1997, p. 149; Ferrera, 1997, p. 235).
G) The prominence of parties as the main aggregators of social interests and the existence of a radical left, not allowing the formation of consensual policies.

Most of these points do reflect the situation in the European South, especially in Italy and Greece. Despite this fact and although this model generally avoids the oversimplifications of other similar propositions, there are several points that need to be raised. It is to these that we now turn our attention.

1.2 A critical approach of the South-European model as the fourth world of Welfare Capitalism

First: Using Esping-Andersen's methodology regarding the scope, the financing, the degree of decommodification2, the underlying organizational features, stratification and the public–private mix etc. it is clear that there is not any fundamental, structural difference of South-European countries, from the standards of the Continental model (cf. Katrougalos, 1996, Esping- Andersen, 1997: 180, Wildeboer Schut et al. 2001). However, the addition of a "Latin-Rim" model is not based on Esping-Andersen's criteria, but on a different framework of sociopolitical data. Ferrera has introduced a new set of political and sociological parameters that differentiate the Southern European countries inside the state-corporatist model. Therefore his propositions do not actually imply the existence of a new model, but merely suggest the existence of a sub-variation within the structural matrix of the existing ones.

The question whether "South-European" welfare states form a subregime or a regime of their own is not Byzantine, but of major theoretical and practical importance. In the first case scenario, if they just constitute a deviating continental welfare state, their participation in the Europeanization process could result to their gradual assimilation with the former archetype. Quite different will be the outcome in the second case, if they represent a resilient, structurally different model. Consequently, the question is not whether there are any *particularities* of the South-European model in comparison with the continental state-corporatist archetype (of course there are), but whether these particularities, by reference to the above mentioned criteria and not exogenous others, could be seen as constituting a *distinct model*.

Second: There are a number of substantial reservations concerning the fundamentals of the proposed model. To begin with, some of the proposed features (clearly among them: corporatist fragmentation; the public deficit in Welfare provision; and the influence of the Catholic Church) are shared by the other continental states. Some however, are not common to all four Southern countries, at least to the same extent (for example, the tradition of clientelism and patronage). It is true that some of the features common with the other countries of the continental model are found to a superlative degree in the European South. For instance, one sees the hyper-fragmentation of insurance funds in Italy and Greece and the resulting huge inequalities. Still, the degree of corporatism is, by the explicit definition of Esping-Andersen, determined by the number of major occupationally distinct pension schemes. Not only Italy and Greece, but also France are characterized by a strong degree of occupational fragmentation as well as by a dualistic system of social protection. Portugal, on the other hand, offers a clear example of a relatively low degree of fragmentation (Ferrera, 1996, p. 19).

The same is true with regard to the treatment of the "selective generosity" of the pensions for the privileged strata of the population, usually the public functionaries. Naturally, by definition, the civil service pensions are occupational in nature. According to Esping-Andersen, the special treatment of civil servants "reflects the legacy of etatism and corporate privilege" throughout the whole conservative model (Esping-Andersen, 1990, p. 81) and the degree of "etatism" of a social protection system is measured by the expenditure on government employee pensions as a percentage of GDP (Esping-Andersen, 1990, p. 73).

Third: The "*iper garantismo*" ('super generosity'), at least in favor of the insiders in the labor market, is one of Ferrara's central arguments in support of the distinct character of the Southern European model. The evidence, however, shows that this is only true for Italy, and partially for Spain. According to OECD figures (Kalisch and Aman, 1999), the replacement rate of income for Greece is estimated at 60 per cent for the basic pension and, after the recent reform of 2008, 20 per cent for the auxiliary pension of pensionable earnings, after 35 years of insurance. Currently, in total, 79.57 per cent of income is insured, when calculated according to article 66 of the European Code of Social Security. Only very few employees, especially in the public sector, do receive a 100% or more of their pensionable earnings, through a combination of primary and auxiliary pensions.

In Portugal, the retirement pension ranges from 30 percent (minimum) to 80 per cent (maximum) of average earnings. A non-contributory supplement is added when the calculated benefit is less than the minimum rate set by law. According to OECD data, on average, newly-retired workers in 1994 received benefits equal to 50.8 per cent of median wages (Roseveare et al., 1996, p. 61). In Spain, as a result of the reforms of the last decade, the ratio of the initial pension in the General Regime and the average net wage in industry and services fell from 65 per cent in 1984 to 53-6 per cent in the 1985-1990 period. (Gonzàlez-Pàramo, 1998).

Moreover, the aforementioned percentages refer to replacement rates, not to the final income of the retired population. The real situation of the level of pensions, far from being generous, can be determined only with reference to the calculation of pension benefits in "purchasing power standards: (PPS). The official statistics of the European Union (Eurostat, 1994) distinguish three groups of countries based on the criterion of the «generosity» of their social protection systems, calculated on the basis of average benefits paid to retired persons. Italy and Luxembourg belong in the most generous group. All the other Southern European countries, however, belong to the least generous group, together with Ireland. The Italian pensioner receives 135 per cent of the average benefit of the EU, and his/her Greek counterpart gets only half and the Portuguese a third of this amount.

The internal differentiation of the four countries is also reflected in the ratio of the income of people aged 65+ to the income of people aged 0-64, which at the turn of the new millennium was 0,96% for Italy, 0,91% for Spain but only 0,74% for Portugal and 0,76% for Greece, compared to 0,88 of the EU average (Commission, 2002).

The final proof against the argument of "*iper garantismo"* is given by the ECHP data of the late 1990s showing that at least in Portugal and Greece, contrary to the other EU member states, old age is the most important factor in determining risk of poverty: The rate of risk of poverty for people over 65 in Greece is 25%, compared to 12% for the active population and 22% and 12%, respectively, for Portugal. In the EU-15 average, by contrast, the risk of poverty for people over 65 is only slightly greater than this of the younger generation (12% and 11%, respectively). The situation is much better for the Italian and Spanish elderly, for whom the risk of poverty is only 8% and 7%, respectively, compared to 13% and 14% for the active population (Commission, 2002).

Fourth: The influence of the Catholic Church cannot be a distinctive feature of the model, not only because Greece is not a Catholic country and the Greek Orthodox Church does not play a similar role in the field of social policy, but principally as Catholicism marks also the core countries of the Continental model. It is true that the Iberian social protection systems, under the additive influence of absolutism and corporatism have typically been shaped by the Catholic Church's fundamental encyclical principle of subsidiarity (*Subsidiarium Officium* Morena and Sarasa, 1991). Equally important is the emphasis on a Catholic version of corporatism that impregnates many Catholic Encyclicals (cf. especially the "Quadregissimo Anno" of Pius XII, 1931) and has exerted a major influence on the authoritarian and fascist regimes of the Iberian Peninsula. The integration of the corporations inside the State had also been the dominant form of the administrative and economic organization in fascist Italy; still, the absence of long authoritarian rule resulted in a different sociopolitical mixture, where clientelism was a much more important factor than corporatism.

Fifth: The establishment of national health systems with universalistic aspirations has been proposed as a decisive factor of differentiation, resulting in "an original mix of corporatism and universalism" (Ferrera, 1997, p. 29). The assumption of universalism as a distinct characteristic of the model based on this sole element, however, seems exaggerated. First of all it is a relatively recent feature. It was not until the late 1970s that Italy adopted a universalistic approach in this area and the other three Southern European countries followed during the next decade. Moreover, universality still remains a half institutionalized premise. For instance, in Greece, 30 social health insurance organizations provide coverage to around 95 per cent of the population (Davaki and Mossialos, 2006); the Portuguese National Health Service covers approximately 75 per cent of the population, the remaining 25 per cent, especially those in the civil service and the military, participate in special additional occupational schemes (Gouveia Pinto, 1997, p. 142). Even in Spain, where coverage reaches 98.5 per cent of the population, of which 93 per cent are covered by the "compulsory" insurance scheme, 1 per cent obtain means-tested subsidies from the state and 4.5 per cent of the population, mostly civil servants, are insured through special schemes. (Jakubowski, 1998).

Morever, the Southern NHS are not completely emancipated from occupational social insurance, which, especially in Greece funds about 40 per cent of total expenses. The same was true ofr Italy till the late 1990's. Even in Portugal, where the funding of the NHS by taxation has been established since 1976, some services are still provided within the framework of social insurance. (Kyriopoulos and Niakas, 1993; Economou, 1999).

Sixth: Clientelism has been suggested as a permanent feature of the political system and the system of social protection. This factor is clearly predominant in Greece and in Italy (Tsoukalas, 1986; Mouzelis, 1977; Filias, 1981; Petmesidou, 1996; Fargion 1999)[3] but much less so in the Iberian countries, which have a different, more corporatist tradition. It seems that in Spain and Portugal clientelistic policies are embedded only in some geographical areas and special sectors (e.g., invalidity pensions). For this reason, 'clientelism should not be considered as a universal cultural characteristic of Southern Europe' (Garcia, 1999, p. 158).

However, in both Italy and Greece, the expansion of a highly fragmented pension system has been used generally for distributing differentiated entitlements to selected party clienteles. The proliferation of invalidity pensions in Italy is an example of these policies on an individual basis. Another example is offered by the fact that in Greece about 40 per cent of private sector workers were classified as working under "arduous and unhealthy employment conditions", which implies the right to early retirement. On the contrary, the extended authoritarian rule in Spain and Portugal resulted in a different pattern of a state dominated system, characterized by the exclusion of organized interests and a more uniform "state charity" pattern of welfare (see Santos, 1994; Guibentif, 1997; Rhodes, 1997, p. 9).

Seventh: The most important objection one could have vis-à-vis Ferrera's model is its "Italian bias", that is a projection of the characteristics of the Italian system to the other three countries. As we have seen this is clear, for instance, with respect to the central argument about the *"iper garantismo",* the purported "super generosity" of the pensions systems as an essential peculiarity of the "Southern Welfare System".

First of all, one should take into account the fact that in Greece, Spain and Portugal, the wages are substantially lower than the European average and often very close to the poverty threshold. Therefore, it is understandable that lower replacement ratios would not ensure the survival of the recipients. Actually, the real situation of the level of pensions is far from being "generous", for all countries except Italy. Admittedly, there is an important inequality between various categories of pensioners in the South, especially in Greece and Italy. More specifically, public servants maintain important advantages with regard to the contributions period and the replacement rate in comparison with the blue-collar workers of the private sector. Still, similar gaps between "high" and "low" protection constitute a general characteristic of the continental model. (cf. also Schulte, 1999, p. 212).

1.3 The South-European "variant" as a sub-category of the State-corporatist model

One cannot but agree with Ferrera that the '"*conservative-corporatist*" political scenario of continental Europe (is) much more complicated in the South, significantly altering the strategies of the various actors' (Ferrera, 1997, p. 30). The "Southerners" do represent a distinct group *within* the family of the Continental welfare states, a variant of this model. *'The peculiarities of these cases are variations within a distinct overall logic, not a wholly different logic per se'* (Esping-Andersen, 1999: 90, cf. Moreno, 2006).

They are merely underdeveloped species of the Continental model, welfare states "in their infancy", with their main common characteristics the immaturity and relative inefficiency of the social protection systems (Gough, 1996, p. 13, who also includes Turkey in his "rudimentary assistance regime") and some comparable social and family structures. Not only are their founding principles undeniably Bismarkean, but also their current institutional, organizational and economic features bear the "signature" of the continental-state corporatist model. Our argument is that the undeniable deviations are either the result of the delayed development of the social protection systems and/or the outcome of the aforementioned distortions of the administrative and political system. It is noteworthy that even the authors who support the institutional distinctiveness of these countries, after a while do not refer to it as a model but rather as the outcome of a chronic disease, speaking about the *"southern institutional syndrome"* (Rhodes, 1997, p. 15). As Matsaganis writes (1999, p. 22), 'in the social protection systems of Southern Europe there are all the distortions of the "conservative model" but to a higher degree'.

However, as there is some clear evidence of convergence with the other European state-corporatist states (cf. Karamessini, 2008), we will continue to consider the Southern member states of the EU as a group of countries with many social, political and administrative affinities. That is we will treat them not as a fourth model in the Esping-Andersen classification, but rather as the *"discount edition"* of the continental one (Abrahamson, 1992, p. 10). Still, one should refrain from regarding all Southern EU member states as similar; the differences are rather important, especially between Italy and Greece, countries of unequal socioeconomic development and between Italy and Greece on the one hand and the Iberian countries on the other.

2. Basic characteristics of the welfare state in Southern Europe

2.1 Social protection systems

Presently, all of their Constitutions establish the normative principle of the "Social State" either explicitly[4] or by means of constitutional provisions guaranteeing a number of social rights[5]. At a sub-constitutional level, the legal entitlement to services or, more often, to monetary transfers in cash, is guaranteed by an analytical and meticulous aggregate of public law regulations. As already mentioned, the welfare provisions are largely based on the insurance principle, connecting social benefits to contributions and consequently, to the salary of the workers. Inevitably, social rights are not universal, but categorical and work focused.

This institutional commitment sharply contrasts to one of the most striking characteristics of the social protection system in the Southern European countries, that is, the delay in the development of the Welfare State. This is strictly associated with the overall delay of economic development, as there is a clear correlation between insufficient social expenditure and low GDP (Eurostat, 1994b; Commission Européenne; 1998, p. 7). All of them (with the exception of the Italian North and some regions in Spain) have been, till very recently, rather poor agricultural countries, characterized by late and incomplete industrialization. The gap between them and the "core" European countries has not been overcome yet. For instance, in the 1990s, the GDP per head in Greece and in Portugal still amounted to only 65 per cent of the Union average (Eurostat, 1994b). The corollary of the belated economic development was the institutional delay of welfare state formation. For example, a compulsory insurance scheme against unemployment was not introduced in Portugal until 1975 (Hoffmann, 1983).

The democratization of Greece, Spain and Portugal, the least developed countries of the region, in the 1970's, was concomitant with an effort to build the structures of a genuine welfare state. The rise of the socialist parties in power favored the process. Over the 1980-1992 period, the southern states have had a real growth of social protection expenditure per capita of approximately 70 per cent, whereas the corresponding figure for the six highest spending Member States was only 31.7 per cent and the EU average 40.6 per cent (Eurostat, 1994b). In the following period only Greece kept up the same rhythm. So, over the period 2000-2004 per-capita social protection expenditure at constant prices has increased in EU-25 by an average of 2.2% per annum and in Greece by 5.2% (Eurostat, 2007).

However, in 2004 the gross average social protection expenditure in the Southern European countries was still lower than the EU average of 27.3% of GDP, but not considerably: the respective figures are 26,1% for Italy, 26% for Greece, 24,9% for Portugal and 20 % for Spain (Eurostat, 2007). All countries belong to the group of middle spenders regarding the percentage of social expenses to GDP and low spenders with regard to social expenditure expressed in PPS (see tables 1-2). Still, it is noteworthy that the expansion of the welfare structures, unlike the experience of other European countries, occurred in a period of general economic recession.

Table 1: Expenditure on social protection as PPS per capita in EU, Southern European Countries and core Continental Countries 2004

EU-25	EU-15	PT	EL	ES	IT	FR	BE	NL	AT	LU	DE
6188	7252	4082	4830	4438	6257	7772	7890	8056	8062	12180	7239

Source: ESSPROS Data 1996-2004, Eurostat 2007

Table 2: Expenditure on social protection as % of GDP in EU, Southern European Countries and core Continental Countries, 2000-2004

	EU-25	EU-15	PT	EL	ES	IT	FR	BE	NL	AT	LU	DE
2000	26.6	26.9	21.7	25.7	19.7	24.7	29.5	26.5	26.4	28.2	19.6	29.2
2001	26.8	27.1	22.7	26.7	19.5	24.9	29.6	27.3	26.5	28.6	20.8	29.3
2002	27.0	27.4	23.7	26.2	19.8	25.3	30.4	28.0	27.6	29.1	21.4	29.9
2003	27.4	27.7	24.2	26.0	19.9	25.8	30.9	29.1	28.3	29.5	22.2	30.2
2004	27.3	27.6	24.9	26.0	20.0	26.1	31.2	29.3	28.5	29.1	22.6	29.5

Source: ESSPROS Data 1996 – 2004, Eurostat 2007

In Italy and Greece (but not in Spain and Portugal) the bulk of income transfers is absorbed by old age pensions and to a lesser degree, invalidity pensions. (see table 3) These are in principle, calculated on the basis of the previous salary and the contributions paid. The rates of these contributions differ widely across occupational categories and economic sectors, with private employees generally paying the highest rates. However, due to the fragmentation of the social insurance units and the plethora of related schemes, especially in Greece and Italy, there is a considerable divergence of the benefits paid to different categories of the retired population (Venieris, 1994). The amount of benefits that households receive in the domain of family allowances or child care is below the EU average. If we take family benefits as an example, these are below the EU-25 average of 7,8 per cent; spending of family benefits in Greece (6.9 per cent) is lower that that of the EU-15 average but is still ahead of Spain (3.5 per cent), Portugal (5.3 per cent) and Italy (4.4 per cent) (Taylor-Gooby 2006: 406, Eurostat, 2007).

Table 3: Social benefits as % of total social benefits (TSB) and as % of GDP in EU, Southern European Countries and core Continental Countries

	Old-age and survivors		Sickness/ health care		Disability		Family/children		Unemployment		Housing and social exclusion	
	% of TSB	% of GDP	% of TSB	% of GDP	% of TSB	% of GDP	% of TSB	% of GDP	% of TSB	% of GDP	% of TSB	% of GDP
EU-25	45.9	12.0	28.3	7.4	8.1	2.1	7.8	2.1	6.5	1.7	3.4	0.9
EU-15	45.7	12.2	28.3	7.5	8.0	2.1	7.8	2.1	6.6	1.8	3.5	0.9
PT	47.2	11.0	30.4	7.1	10.4	2.4	5.3	1.2	5.7	1.3	1.0	0.2
EL	50.9	12.8	26.5	6.7	5.0	1.3	6.9	1.7	5.9	1.5	4.7	1.2
ES	43.7	8.5	30.8	6.0	7.5	1.5	3.5	0.7	12.9	2.5	1.7	0.3
IT	61.3	15.4	25.9	6.5	6.1	1.5	4.4	1.1	2.0	0.5	0.3	0.1
FR	43.6	12.8	30.0	8.8	5.8	1.7	8.5	2.5	7.8	2.3	4.4	1.3
BE	44.1	12.3	27.7	7.7	6.8	1.9	7.1	2.0	12.5	3.5	1.8	0.5
NL	41.6	11.1	30.4	8.1	10.9	2.9	4.8	1.3	6.3	1.7	6.0	1.6
AT	48.2	13.6	25.0	7.1	8.3	2.3	10.7	3.0	6.0	1.7	1.8	0.5
LU	36.5	8.1	25.0	5.5	13.5	3.0	17.4	3.8	4.7	1.0	2.9	0.6
DE	43.5	12.4	27.2	7.7	7.7	2.2	10.5	3.0	8.6	2.4	2.5	0.7

Source: ESSPROS Data 1996-2004, Eurostat 2007

The disproportionate distribution of the social benefits between the elderly and the non-aged population is a salient characteristic of the state-corporatist model. Whereas the welfare State covers about 50 per cent of the day care needs of Swedish or Danish children, the coverage is below and below 4 per cent in Greece and Spain (Bagavos, 2003). The basic reason for this underdevelopment of child care is that it remains by and large the family's responsibility, with the possible exception of Portugal, in which an unusually high percentage of female employment[6] has forced the state to undertake part of it. These services are traditionally provided by women (full-time housewives).

A factor of differentiation, which partly explains the dissimilar pattern of welfare benefit distribution in the Iberian countries, especially in Spain, is, since the beginning of the 1980's, the departure of their social protection systems from the traditional orientation of income protection towards a system focusing more on economic growth and employment support (Rhodes, 1997, p. 38). The new paradigm has workfare characteristics and is targeting the excluded through means tests (Lapara and Aguilar, 1997).

Another common characteristic in most southern European countries, subsequent to the predominance of insurance based benefits, is the very low expenditure on social assistance. This is particularly low in Greece and relatively higher in Italy and in Spain. In the latter country, in the 90's social assistance schemes covered 12 per cent of the population, as a response to high unemployment and job instability, which constituted a very important danger for the social cohesion of Spain (Lapara and Aguilar, 1997). Nevertheless, the new social assistance programs are rather extensions of the contributory ones, failing to reach the real outsiders of the market and those excluded from the market, thus reconfirming, the "corporatist" character of the system.

In addition, and contrary to the median Continental "core" countries, until recently the southern welfare systems lacked any kind of universal minimum income support scheme (and they are still lacking income maintenance for non insured young persons below 25 and first-job seekers). Portugal was the first to introduce such a scheme (in 1996), while local and regional schemes exist in Italy and Spain. In Greece there is still no such scheme.

Regarding the financing of the social security system, there is an absolute dominance of contribution based social insurance schemes. Although the idea of an equal distribution of the expenses between the State, the employers and the employees has been discussed recently within the framework of a social dialogue prior to the adoption of the reforms of the insurance legislation in all four countries, the advent of the new millennium found traditional institutional patterns remaining almost intact. Only the National Health Systems are financed by the state. Yet, in practice, the public purse also covers the deficits of the insurance units. Accordingly, the pattern of financing is similar to the average of the state-corporatist model. (see table 4).

Table 4: Social protection receipts as % of total receipts in EU, Southern European Countries and core Continental Countries, 2000-2004

	Tax financed and general government contributions		Social contributions						Other receipts	
			Total		Employers		Protected persons			
	2000	2004	2000	2004	2000	2004	2000	2004	2000	2004
EU-25	35.4	37.3	60.9	59.5	38.7	38.6	22.3	20.9	3.7	3.2
EU-15	35.5	37.5	61.0	59.5	38.7	38.6	22.2	20.8	3.6	3.1
PT	39.1	42.2	53.0	47.5	35.6	31.7	17.4	15.7	7.9	10.4
EL	29.2	30.5	60.8	60.8	38.2	37.3	22.6	23.5	10.0	8.7
ES	27.4	30.3	68.7	67.2	52.4	50.9	16.3	16.4	3.9	2.4
IT	40.6	42.4	57.7	56.0	42.8	41.2	14.9	14.8	1.6	1.6
FR	30.4	30.4	65.9	66.0	46.0	45.5	19.9	20.6	3.8	3.5
BE	25.3	27.0	72.1	71.1	49.9	49.3	22.3	21.8	2.5	1.9
NL	14.4	19.2	67.5	68.7	29.4	34.0	38.1	34.7	18.1	12.1
AT	32.7	34.6	66.0	64.0	39.0	37.2	27.0	26.8	1.3	1.4
LU	46.9	44.6	48.6	51.8	24.7	27.3	23.8	24.5	4.6	3.6
DE	31.8	34.5	66.1	63.8	38.5	36.3	27.6	27.6	2.1	1.7

Source: ESSPROS Data 1996 – 2004, Eurostat 2007

In the EU, 59,3% of the financing of social protection still comes from contributions, some 60% of this paid by employers. In the Southern European countries there is a similar situation, as most revenue comes from contributions. The proportion derived from social contributions is greater in Spain, accounting for 67,2% of total receipts, which is similar to the core countries of the corporate model (France, Belgium, the Netherlands, Germany) It is only in Portugal that this type of financing is slightly less than 50% (47,5%) (Eurostat, 2007, for the similar, older data see Commission Européenne, 1998, p. 10; Eurostat, 2000).

2.2 Familism

Statism, familism and soft-budgeting are three pillars which compensate for and to a certain extent legitimise the lack of *inter alia* effective labour market policies. It is within this environment that the passive and active labour market policies outlined in Katrougalos and Lazaridis (2003), take place.

Familism is a key component of the clientelistic forms of social organisation, which in turn are closely related to the practice of appropriating resources by political means. Soft-budgeting refers to 'an accounting practice by individuals, families and household and enterprises in which the strict condition that earnings must always be greater than, or at least equal to expenses, is not obeyed, simply because someone else is paying the difference (Petmesidou and Tsoulouvis, 1994: 22). Imbalances like this are met via clientelistic means.

The family in Southern Europe is a strong institution. It is defined as a social unit founded on heterosexual marriage. Discriminating effects result from the privileged treatment of this special kind of living arrangement (eg: with the exception of Spain and Portugal, constitutional rights are offered only to heterosexual married couples) which in turn determines eligibility for tax relief and social security entitlements. In Greece different forms of interpersonal relationships and personal living arrangements, such as same sex partnerships and other forms of relationships outside the traditional form of marriage, are either not supported by social policies or not equally protected and discriminated against by the social security systems of the southern European member states. Unlike Greece, in Italy since the late 1980s cohabiting couples could officially register their partnership (Hantrais, 1995: 88-89); Portugal has since the mid-nineties introduced laws on the protection of cohabitating couples. Idealising the traditional family arrangements means reproducing personal relationships of power and dependence among family members; in earnings related benefit provision, 'the husband is employed (full time) and acquires social security entitlements for himself and his dependants, whereas the wife is the family worker and receives social protection only indirectly through her husband' Leitner (2001: 103).

What does this two-tier system mean for women? If we take retirement benefits as an example, the benefits granted to those elderly who do not have matured contributive entitlements, which is the case with women who may have had a history of discontinuous employment or are in part-time employment due to the need to look after a dependant family member, is much lower than the benefit received at the age of retirement by someone who has had a full career formal economy (Ferrera, 1996: 20). This disruption of career is often encouraged by limiting the supply of public social services to a minimum. A minimum duration of insurance coverage is required to acquire eligibility to earnings-related pension; whereas in Italy this minimum qualifying period is as low as 5 years of contributions, Greece, Portugal and Spain require 15 years of coverage (Leitner, 2001: 103). Those working discontinuously, which are most likely to be women, do not meet the qualifying conditions and are thus restricted from access to pension schemes. Regarding women who decide to retire earlier in order to look after a grandchild, or an elderly infirm spouse, the final benefit received is affected as the final benefit calculation is affected by the period of insurance coverage – the maximum period of insurance coverage is 35 years in Greece and Spain, 40 years in Portugal, whereas in Italy there is no limit to it.

Women's economic dependence on the family is not seen as a social problem (Saraceno, 1994). In Southern Europe, the notion of 'subsidiarity' means family first, state last resort. The state intervenes when family resources are exhausted and has not the 'socialising' approach one would find in, for example, Esping-Andersen's (1990) social democratic regime. It also requires a specific organisation of work within the household where one adult member functions as the family breadwinner while the other cares for the family. This is crucial in understanding gender relations in the European south, despite the latest changes stemming from the rise of female employment, especially in Portugal.

The price of allowing women to enter the labour market is by en large falling either onto the family budget, (eg: hiring informal paid work), or onto family and kinship support networks.

The majority of offspring tend to live with their parents until they get married, with the exception of those who migrate for studies or for work (Lazaridis and Koumandraki, 2001; Bernardi, 2005; Holdsworth, 2005). During this time, they are financially supported by the family irrespective of whether they have a separate income or not. Family obligations are defined and re-defined during various stages of the life cycle. 'For every young working woman there is at least one older woman (mother or mother-in-law) who may not live in the same household but who plays an active part in taking care of children' (Ruspini, 2000: 108). When the children become adults and parents older, the caring roles change in that the younger generation is now responsible for the care of the elderly. The family unit is operating as a 'social clearing house mediating the difficult relationships between a variegated labour market and equally variegated income maintenance systems' (Ferrera, 1996: 21).

Earnings-related schemes often grant additional credits for unpaid care work, such as care of children, thus partially compensating for time spent undertaking caring work. The length of periods credited varies from one country to another; for example, up to six months of coverage per child in Greece and Italy (in both cases available only to mothers), two years in Portugal, one year in Spain (with two optional additional years without entitlements for pensions and unemployment). Italy has also a subsidized pension scheme for housewives. Also, there are old age benefits available for spouses and survivors of persons who are covered by an earnings-related scheme; in Greece for example, the spouse receives a flat rate supplement for a dependent spouse, whereas a survivor receives 70% of the deceased's pension. In Italy and Portugal the survivor receives 60% of the deceased's pension respectively (in Italy this is income tested), and 45% in Spain. However, such benefits are low when compared to entitlements gained from employment. Entitlement for family work 'does not result from direct but indirect social rights' (Leitner, 2001: 108). Furthermore, such benefits reflect the norm of heterosexuality combined with the institution of marriage. The privileged treatment of traditional family arrangements based on the principle of subsidiarity on the one hand and entitlements for spouses alongside a limited supply of public social services, helps maintain the traditional division of labour where one person functions as the family breadwinner and the other as the family carer.

Under-provision of services implies that a large amount of the care work to be done is done by women and assumes that there are women at home ready to do it, be it citizens (traditional full time housewives) or strangers (hired help). According to Liefbroer and Corijn (1999) 'structural-role incompatibility' between the opportunities available to women in the labour market and the constraints that they face when trying to take advantage of these opportunities is often coupled with a 'cultural incompatibility' which relates to the ideologies, values and norms concerning their role in society. However, if one compares the data from the World Values Survey on women's attitudes towards family and gender roles for Portugal to that for the other three southern European countries under study, it seems that the Portuguese women tend to have a more 'traditional' view about the role of women in the family and society to that of the other three countries.

The arrangements for paid maternity leave in the four countries differ. In Greece paid maternity leave is given for 16 weeks with 100% income replacement; but it pays the lowest maternity benefits of the four. Similar to Greece, in Spain this is given for 16 weeks on 75% income replacement, whereas this is more generous in Portugal (18 weeks on 100% replacement rate) and in Italy (22 weeks on 80% replacement rate). Greece, Spain and Portugal provide the right to paternity leave (2 days with 100% income replacement in Spain and 5 days in Portugal). Entitlement often depends on having a contract for permanent employment.

Arrangements for parental leave vary: in Spain, Greece and Portugal there is no statutory entitlement to paid parental leave. People who interrupt their career to look after their children have to do so without pay. Italy offers six months, Spain 12-36 months, Portugal 6-24 months, while Greece offers the shortest period of parental leave in the private sector in the EU, 3.5 months (6 months for lone parents), and is offered only to those employed by companies with more than 50 employees, thus excluding all those employed by small companies (Ruxton, 1996; Papadopoulos, 1998).

Non income related family benefits are not available in Italy and Spain whereas in Greece and Portugal are and depend on number and age of children. Portugal has the lowest age limit; benefits are paid for all children up to the age of fifteen and can be extended for another ten years for those who continue in education. In Greece, Italy and Spain benefits are paid for children up to the age of eighteen, but whereas in Greece the limit can be extended up to the age of twenty-two, Italy and Spain have no such provision (Hantrais, 1995: 90).

The familistic nature of the Southern European welfare model explains the embryonic form of the regime as regards family policies. Despite the importance of the family in caring for children well into adulthood and in spite of the strong moral and ideological emphasis on the role of the family in holding society together, there is a lack of family policy (Gauthier, 1995). A pattern of power relationships among members of the family and the residual family policy reinforce the role of women as the main carers of children and the elderly. It also reinforces the reproduction of private patriarchal relationships, whilst a shift towards public patriarchal relationships still remains in an embryonic form. Women's different experiences and structural position seem to militate against their full access to the rights of citizenship (Walby, 1997: 173). Social citizenship depends upon being a worker for full access to citizenship rights, as 'significant aspects of income maintenance payments by the state, pensions, and related welfare provision are provided as a result of wage employment' (ibid). Women who are not employed, fall back on meagre levels of support (eg: pension benefits), often derived via their spouses, so long as they stay married. Women who work part-time or have interrupted their employment for a period of time, in order to be able to meet their commitments to the care of children and/or elderly relatives, are often not able to get access to a decent pension, as this is incompatible with the role of carer. Walby (1997: 173) asks: 'should women only be entitled to citizenship if they behave like men and have lifetime commitment to paid employment'? 'And if so, what are the implications for those who need care'? These are important questions as under the rules of the southern European welfare systems paid employment is the main route of access to decent support in old age. One solution would be for women to enter the labour market and demand that their position as carers is supported by coherent child care policies which would reflect the value of caring work to society whether it be done in private or in public. However, if women are to be fully integrated into full democratic citizenship, radical changes in personal and domestic life are required. In southern Europe, although many changes have taken place gradually eroding the male breadwinner character of the welfare state in southern Europe, more changes need to take place; for example, although mothers with young children have increased their participation in the labour market (in the mid 1990s 52% of Italian mothers between 20 and 30 and 77% of Portuguese mothers in this age group were employed), the point of departure in terms of having a choice in terms of *decommodification* and *defamilialisation* in conjuncture with personal autonomy is yet to come. 'A more desirable welfare state from the point of view of women as mothers would not merely aid them when their children are young but also ensure that lifetime benefits, such as pensions, are not sacrificed or indeed that these directly reflect the time spent raising children' (Davaki, 2006: 265).

2.3 Labor market policies: recent developments up to the turn of the millennium

In an era of recession and high rates of unemployment throughout Europe, all Southern European countries have serious labor market problems, with high rates of unemployment, despite a move towards flexibilization (numerical and functional), decline of employment regulations in terms of restrictions on the freedom of firms to use particular work practices, new forms of less secure work contracts replacing old traditions of paternalistic and protective employment regulations.

The employment rate is very similar in the three of the four countries. The percentage of male employment is 70.8 in Greece, 70.9 in Spain and 68.5 for Italy, whereas the respective figures for female employment are 40.9 in Greece, 41.9 in Spain and 41.1 in Italy. Portugal, on the contrary, scores higher both regarding the male (76.9%) and the female employment (61.1%), the latter being exceptionally high, almost at Scandinavian levels. (European Labor Force Survey, 2001). Nevertheless, in all four countries there is a relatively large gender gap in employment rates. (Low levels of women's employment is a general feature of the continental-corporatist model (Gornick and Jacobs, 1998: 691) but the trend is more accented in the South).

Amongst the employed, in all four countries there is a division between the protected core and the rest, especially those in temporary and irregular employment, those in working in the informal sector and the unemployed. Amongst the unemployed, youth and women have been especially hard hit. In Greece for instance, the rates of unemployment of these groups were in the mid-1990s approximately 29 and 15 per cent respectively (OECD, 1996, p.p. 240-243). In 2001 the respective figures for the young unemployed have improved only in Spain and Portugal (20% and 9.2% respectively), remaining very high for Greece 28% and Italy 27% (OECD, 2002, Statistical Annexes, Tables C).

In an attempt to tackle unemployment, all four countries embarked on a deregulation program in the 1990s. As a result there has been a proliferation of precarious fixed-term contracts, while the informal economy continues to grow. Having said that, part-time contracts are, in all four countries, significantly lower than the EU average and ranged from the mid-nineties till today from round 4.5% in Greece to 8.0% in Italy (Eurostat, 1995a, OECD, 2002, Table E). Actually, however, a large percentage of second or short-term jobs are located in the informal sector and do not appear in the statistics. The informal sector is therefore an important form of 'unemployment and/or subemployment relief'. Estimates of the percentage of the population in each country working in the informal economy vary according to region and sector of economic activity. The informal economy produces an estimated 22% of the GDP in Portugal (Berneo, 2000, p. 270), between

30% and 45% of the GDP in Greece (Canellopoulos, 1995; Eurostat, 1995b) and constitutes 21% to 25% of Italy's GDP (The Economist, 1997). The persistence and expansion of the informal economy activities, as an alternative process of income generation, has had profound implications on employment in these countries. Informalisation reinforces labour market segmentation, which in turn involves the compartmentalisation and isolation of different groups of participants in the labour market. More stable and secure jobs are offered in the primary that in the secondary labour market. Flexible use of family members, in response to seasonal labour shortages in the agricultural sector, goes back well prior to the tertiarisation process. These features, along with familism and clientelism, constitute elements of a complex and distinctive mode of income generation and distribution with important effects on the implementation of employment policies.

In the late 1970s and early 1980s, all four countries had relatively restrictive employment protection legislation (for example, strict job demarcations and work schedules, strict rules for dismissals etc). This was considered to be one of the factors contributing to the rapidly growing unemployment rates mentioned above. At the same time, the informal sector allowed a degree of labour flexibility and deregulation[7]. This *Janus face of the southern European labour market*, partly allows for the relatively high levels of unemployment to be tolerated in an environment where unemployment insurance is a big burden on national budgets.

Generally, there is no comprehensive strategy of labour market intervention but rather policies are fragmented into numerous legislative acts adopted ad hoc in response to particular problems. They comprise a large number of schemes that roughly correspond to different professional groups of the unemployed and different causes of unemployment (eg: collective versus individual dismissals). 'The fragmentation and disparities in income support system of the unemployed, with extreme differences and gaps in the level of social protection given to core and marginal workers, are the result of a complex system of guaranteeing full time, stable jobs for core workers (traditionally males in the middle age group) through employment protection measures, income support to laid-off workers and a public monopoly in job placement' (Dell'Aringa and Lodovici, 1996, p. 177). Under this system, those who cannot secure full employment and establish contributive entitlements in the formal labour market are offered little protection. Unemployment policies are often linked with policies developed as substitutes for unemployment insurance, such as invalidity pensions, typically in Italy, but also in Greece.

Since the 1980s, labour market reforms have focused on ways to tackle unemployment and one of *faces cheeks*, labour market rigidity. In an attempt to improve labour market performance and combat unemployment, governments introduced various employment policy reforms, which, often, met serious resistance by the labour movement. Such reforms were more often than not introduced through public intervention and often aimed at fulfilling particularistic goals. Governments introduced market forces into many parts of the economy and deregulation measures for labour markets. This manifests a departure from a logic of reciprocity, of an immediate exchange of benefits between the state and the social partners.

One could again trace the differentiation of the southern European countries: initially the Iberian countries seemed both prone to follow neo-corporatist strategies, whereas Italy and Greece shared a common tradition of polarised labour relationships. More specifically, in Portugal, the mechanism of social *concertation* was officially introduced in 1984. Since then, wide social pacts have been consolidated in the context of a strategic frameworks for improving national economic competitiveness, such as the Economic and Social Agreement of 1990, which focused on improving the international competitiveness of Portuguese firms and on promoting the growth of real wages. Another important step towards the reinforcement of social *concertation* is the 'short term social pact' signed in 1996, promoting, *inter alia*, a more flexible organisation of working time based on functional flexibility.

Similarly in Spain in the early 1980s the government 'conceded a substantial narrowing of wage differential and the maintenance of Francoist employment protection, in return for wage moderation and an 'implicit pact' between workers and economic managers under which the costs of economic modernisation would be accepted' (Rhodes, 1997b, p. 114). Thus unions legitimised themselves as social actors, employers were rewarded and the state promoted modernisation of the economy. The Social and Economic Accord, for example, signed in the mid-1980s, sought to inject more flexibility into the labour market by reducing restriction on part-time work and seasonal employment, increasing options for temporary employment and lowering the minimum wage standards for workers under 18 (Encarnacion, 2000, p. 39-40). However, the persistence of government in achieving wage moderation by encouraging casualisation of employment could not be anymore supported by the trade unions. By the mid-1980s social *concertation* broke down and from then on reforms were introduced either unilaterally by the government or with consultation with employers' associations.

The reform of the late 1980s and 1990s lave legalised fixed-term contracts, lifted restrictions on part-time work and relaxed dismissal procedures, thus promoting employment vial deregulation of the labour market.

On the contrary, Italy and Greece have had traditionally highly polarised industrial relations, which limited the possibility of broad social arrangements on policy reforms. It is true that the 1990s seemed to represent a turning point for Italy, as consensual reforms aimed to reorganised 'the entire system of job placement, creating new space for private actors in the regulation of the labour market and promoting new active policies for local government' (Ferrera and Gualmini, 2000, p. 194). However, the attempt by the Berlusconi government to impose unilaterally and without the consent of trade unions a sweeping reform of labour law, constitutes a return to the conflictual character of labour policies.

3. Concluding remarks

The argument put forward in this paper is that the welfare systems of Italy, Greece, Portugal and Spain share all the basic institutional characteristics of the 'state corporatist' welfare model. However, the overall underdevelopment of the welfare state in the aforementioned countries, together with a number of similarities in their social structures and economic trajectories –especially familism– clearly classifies them in a distinctive sub-category of the above model. In other words, the southerners represent a distinct group, a variant within the family of the Continental welfare states. The four countries share some characteristics such as similar structures of social and economic development, the relative inefficiency of the social protection systems and some comparable social and family structures. Nevertheless, we have shown the existence of important differentiation *inside the group*:

The dissimilar weight of patronage and clientelism, which is much stronger in Greece and Italy than in the Iberian countries, is one of the factors of this differentiation. The development of the female employment in Portugal is another. We have also noted a trend of convergence –at least with regard to the social expenditure levels– of the four countries and the rest of the EU. However, it is not at all certain that this trend will lead to full 'Europeanisation' of the social policy of the four countries. Financial restraints on public spending imposed by the monetary union and the pressure of international competition in the globalised arena may be counter factors to that. As the industrial relations are undergoing a structural adjustment towards less protected patterns and as the traditional familism is gradually eroding, one cannot exclude a retrenchment in a weak welfare state in countries which have little, if anything, to put in its place. For instance, the staff of the National Health System are allowed great margins of freedom to render services on a private basis and even the NHS itself contracts out to private health centers (the Spanish *conciertos*, the Italian *centri convenzionati*). Public institutions also display a low degree of state power proper, as they are highly vulnerable to partisan pressures and manipulations.

Notes

1. For instance, the staff of the National Health System are allowed great margins of freedom to render services on a private basis and even the NHS itself contracts out to private health centers (the Spanish conciertos, the Italian centri convenzionati). Public institutions also display a low degree of state power proper, as they are highly vulnerable to partisan pressures and manipulations..
2. For instance, according to the recent estimates of Bambra (Bambra, 2006) Italy belongs, together with core continental countries like Germany, in the same "medium decommodifying group". Cf., however, also Scruggs and Allan, 2006.
3. It should be clear that public employment, as a welfare substitute, is quite different in the European South from the Scandinavian paradigm where the State is also an employer of first resort, as in the South, this does not serve any welfare state function but merely satisfies the clientelistic policies of the leading political parties.
4. Cf. the articles 1 para. 1 Constitution of Spain and 2 of the Constitution of Portugal.
5. Cf. the articles 2-4, 31, 32, 35-38, 41, 45, 46 of the Italian Constitution, 21, 22 of the Greek one, 39-52, 129, 148, 149 of the Spanish and 56, 59, 63-72, 108, 109, 167, 216 of the Portuguese.
6. According to Crompton and Lyonette (2005, p.2), since the mid-1970s the number of women in workforce in Portugal has increased steadily, with well above 6o per cent of all women in work at the turn of the new millennium as opposed to only 18 per cent in the early 1960s.
7. The degree of labour flexibility and the deregulation of employment conditions and procedures as well as the mix between rigidity and irregularity varies from one locality to another. This variability depends on a number of factors such as: sector of production prevailing in the area; size and type of firms; adjustments to changes in the labour market and to pressures exerted by the EU convergence criteria; extent of state intervention and policy styles; and labour market reforms.

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