Is there an Extended Family of Mediterranean Welfare States, or: Did Beveridge and Bismarck take a Mediterranean Cruise Together?

Prof. John Gal

School of Social Work and Social Welfare

Hebrew University of Jerusalem

Israel

msjgsw@mscc.huji.ac.il

Presented at the SPA Annual Conference, Edinburgh, June 29-July 1, 2009

Is there an Extended Family of Mediterranean Welfare States, or: Did Beveridge and Bismarck take a Mediterranean Cruise Together?[1]

John Gal

Introduction

The study of welfare states and social policy has enjoyed growing popularity in the last four decades. Emerging from primarily descriptive studies of state-provided welfare, social security and health institutions and from relatively crude quantitative and qualitative comparative studies, this field has been characterized by a growing level of theorization, richer case study analyses, inclusion of additional sources of welfare provision (non-profit, market-based, informal, family), and increasingly complex, accurate and up-to-date cross-national comparative analyses (Castles, 2004; Clasen & Siegel, 2007; Ferrera, 2008; Huber & Stephens, 2001; Mabbett & Bolderson, 1999).

One explanation for the growing interest in the welfare state and in various aspects of social policy is the significant role this type of public policy has played in public expenditure in industrialized nations. According to the latest OECD data, net public expenditure on social protection in member countries reached 20.6% of GDP on average in the middle of the first decade of the new millennium (OECD, http://www.oecd.org/dataoecd). Among European welfare

[1] I would like to gratefully acknowledge the assistance of Michal Alfasi in the collection of data for this paper and to David Levi-Fauer for his very useful comments.

states, this percentage is even higher, reaching 27.8% in 2005 (Eurostat, 2008). In Europe, interest in social policy and, in particular, comparative social policy is motivated by a growing desire on the part of decision makers in European Union nations to move towards greater coordination and cooperation in the field of social policy (Ferrera, Hemerijick & Rhodes, 2001; Kleinman, 2002; Kvist & Saari, 2007; Taylor-Gooby, 2002).

A major theme in welfare state research during the last decade and a half has been the growing tendency to create welfare regime typologies, according to which diverse types of welfare regimes are identified (Bambra, 2007; Gough et. al., 2004). The goal of these typologies is to enable scholars to better understand trends and developments within welfare states and to generate credible explanatory variables in order to explain similarities and differences in structures, spending and impact (Aarts & Gellisen, 2002). In his influential texts, Esping-Andersen (1990; 1999) identified three distinct welfare regimes (the liberal, social-democratic, and corporatist) that differ in the patterns of state, market and household provision of welfare, the degree to which labour is decommodified (i.e., dependence on market forces is weakened), and the impact of welfare state institutions on stratification.

In addition to the three regimes identified by Esping-Andersen, additional welfare regime types have been identified over the years (Aarts & Gellisen, 2002). One of these has been variously described as the Latin Rim, the Southern European or the Mediterranean welfare regime (Ferrera, 1996; Liebfried, 1992; Rhodes, 1997). While the countries identified as belonging to this regime have characteristics that are similar to those of other welfare states, the claim has been that there are nevertheless a number of aspects of welfare state structuring, funding, provision and results that set them apart. The identification of a unique Mediterranean welfare regime is one starting point for thispaper .

A second point of departure focuses on the two dominant traditions within social policy, those associated with Beveridge and Bismarck (Bonoli, 1997). Given that William Beveridge was only 19 years old when Otto von Bismarck died in Germany, it is highly unlikely that these two individuals ever actually undertook a Mediterranean tour together. Indeed there is no empirical basis for the claim that the two actually traveled a cruise ship together, gambling and sunbathing their way through a grand tour of Spain resorts, Italian ports, Greek islands and Holy Land sites. Nevertheless, despite the fact that these two gentlemen never made a joint physical appearance in the Mediterranean, the impact of the welfare state legacies associated with their names on the countries in this region is apparent. Even a superficial glance at the welfare regimes in the diverse nations of the Mediterranean appears to indicate that the spirits of Beveridge and Bismarck still haunt the institutions of the welfare states in this region, sometimes appearing solo and at other times in tandem.

My goal in this paper is to suggest that an extended family of Mediterranean welfare states does indeed exist, that it can offer a useful framework for analysis of welfare states in this geographic region and that we should include in this family a number of nations that have generally been ignored in the discourse on Mediterranean welfare states.[2] More specifically, the claim will be that the conceptual and geographic boundaries of this Mediterranean extended family of welfare states are much less rigid than those

[2] I am borrowing the term "family of nations" introduced into the welfare state literature by Castles (1993) and later explored by Orbinger & Wagschal, 2001.

generally understood in the notion of a Mediterranean welfare regime and that this family of nations encompasses welfare states modeled on different approaches to the provision of welfare and the structuring of the institutions engaged in provision. The ongoing legacies of Bismarck and Beveridge, as well as other factors, have contributed to differences between these family members and these differences should not be ignored and sidelined. Nevertheless I will endeavor to underscore a number of features common to members of this extended family of welfare states. Finally three overarching themes that, in the past and present, appear to indicate the underlying commonalities of Mediterranean welfare states and that can offer potential fruitful avenues for further study will be identified and discussed.

The Extended Family of Mediterranean Welfare States

The notion of a distinctive Mediterranean or Southern European welfare regime emerged shortly after the publication of Esping-Andersen's 1990 book, *The Three Worlds of Welfare Capitalism.* Esping-Andersen included only a single Southern European nation, Italy, in his original schema and it was labeled a corporatist welfare regime.

In a series of studies published in the 1990s in the wake of Esping-Andersen's work, scholars questioned his inclusion of Italy in the corporatist regime type and his exclusion of other southern European welfare states from the analysis (Ferrera, 1996; Liebfried, 1992; Rhodes, 1997). They then went on to suggest that there exists a fourth welfare regime and that this so-called Latin Rim, Southern European or Mediterranean welfare regime has characteristics which distinguish it from the other welfare regimes. The nations generally included in this regime were Italy, Spain, Portugal and Greece.

These nations were seen as belonging to a family of nations due not only to their geographic proximity but also due to common historical and cultural legacies. Their common history of relatively recent non-democratic rule (particularly in the cases of Spain, Portugal and Greece), the influence of religion (in particular Catholicism) upon diverse aspects of life, not least the family and the provision of welfare, and their seemingly 'rudimentary' welfare state systems were underscored as contributing to the need to differentiate these nations from other welfare states (Castles, 1995; Gough, 1996; Liebfried, 1992). More specifically, the three distinctive characteristics of the Mediterranean welfare regime, as identified by Ferrera in the mid-1990s, were the dualism, fragmentation, and ineffectiveness of the social protection system, which often led to marked gaps between segments of society and high levels of poverty within specific geographical or social sectors; the existence of universal (or near universal) health provision by the state alongside a flourishing private health market; and the particularistic-clientelistic form that the welfare state took in these nations (Ferrera, 1996). In addition, a number of observers have underscored the major role of the family, rather than the state, the market or the workplace, as a provider of welfare in these countries (Moreno, 2002; Naldini, 2003). Looking at issues of social expenditure and the type of financing predominant in various welfare states, Bonoli (1997) added two additional features of the Mediterranean family of nations that depict some of these characteristics from another perspective – low levels of social expenditure combined with an adherence to the Bismarckian tendency to prefer contribution-funded and income-related benefits over the use of tax-funded flat-rated transfer programs.

Despite Esping-Andersen's (1999) later rejection of this attempt to identify a distinctive Mediterranean regime, a number of studies undertaken in the years since have found varying degrees of support for the model. This with regard to policies adopted by the nations affiliated to this regime and their consequences (Aassve, Mazzuco & Mencarini, 2005; Arnstein, Mazzuco & Mencarini, 2005; Chesnais, 1996; Ferreira, 2008; Fouarge & Layte, 2005; Mâitre, Nolan & Whelan, 2005; Muffels & Fouarge, 2004; Ogg, 2005; Trifiletti, 1999; Tsakloglou& Papadopolous, 2002), to certain characteristics of these societies (Guiliano, 2007), to the self-perceptions of the citizens of these countries (Eikemo, Bambra, Judge & Ringdal, 2008), and to their attitudes to diverse welfare state issues within them (Ginn & Fast, 2006).

In more contemporary welfare state research discourse, regime terminology and particularly the regime typology formulated by Esping-Andersen has been subjected to conceptual and methodological criticism (Aarts & Gelissen, 2002). In addition to the claims that the original Esping-Andersen typology ignored additional regime types and that it failed to take into account fundamental issues of gender (Lewis, 1997; Orloff, 1993), critics have found fault with various methodological aspects of his original analysis (Bambra, 2006; Scruggs & Allan, 2006) and with the over-emphasis upon cash transfers rather than social services of different kinds (Bambra, 2005; Jensen, 2008). More damning, perhaps, has been the assertion that the assumption that there is any dominant approach to welfare provision in a single regime or that there is any coherence in social policy in a single country is extremely problematic (Kasza, 2002). Linked to this is the sense that changes over time lead to qualitative and quantitative changes in the structuring of welfare states and a diluting of the significant differences that existed between the regimes in the past. Factors such as globalization, movement towards a European Social Model by European welfare states, and peer pressure upon welfare state laggards within the EU to increase social spending and achieve standards of coverage and benefit generosity on a par with a European norm, appear to be major contributing factors to this process.

The Southern European welfare regime, it seems, is particularly susceptible to these critiques. Progress towards European integration, marked economic and labor market changes, and welfare institution restructuring in the nations of Southern Europe have tended to blur some of the more distinctive differences between these and other countries in Europe (Morlino, 2002). The Europeanization of Spain, Portugal, Italy and Greece appear to have pushed them much closer to an emerging European Social Model (Andreotti, Garcia, Gomez, Hespanha, Kazepov & Mingione, 2001; Cousins, 2005; Guillén, Álvarez & Adão e Silva, 2003; Kvist & Saari, 2007). Despite these developments, there still appears to remain a number of distinctive characteristics that differentiate welfare states in the Mediterranean region from those to their north in Europe and across the seas in America and Australasia (Moreno, 2006; Vogel, 2004).

Enlarging the Mediterranean Family

Traditionally, the focus of research and debate concerning the Mediterranean family of nations has been on a small number of countries in Southern Europe (Spain, Portugal, Italy and Greece), all of which were members of the EU 15.

Nevertheless, some observers have tended to extend the nations included in this family of nations to encompass others. This is particularly the case due to moves in recent years to expand membership of the European Union. Alongside the major eastward direction of extension of the union, a southward process also occurred. Two Mediterranean island nations, Cyprus and Malta, were the principle beneficiaries of this extension and in recent literature tend to be incorporated in the Southern European/Mediterranean grouping of welfare states (Graselli, Montesi & Iannone, 2006; Böhnke, 2008; Peristianis & Kokkinou, 2008). Turkey, a candidate country and potential member of the EU, has of course been the subject of much debate within European Union nations (Eurostat, 2003; Manning, 2007). As such, its welfare and social protection systems have been the subject of growing interest and some observers both within Turkey and abroad have also included this country in discussion of the Mediterranean family of nations (Buğra & Keyder, 2006; Gough, 1996; Saraceno, 2002).

Israel has not usually been included in the literature on the Mediterranean family of nations. Not being a candidate country for membership in the European Union (though affiliated to the EU in various ways), it has not generated much interest in welfare state-related discussions within Europe. Moreover, there is much uncertainty and contention regarding the relevance of existing welfare state typologies to the Israeli case. While some observers have portrayed Israel as exhibiting characteristics similar to those of a corporatist welfare regime (Lewin-Epstein, Stier & Braun, 2006; Okun, Oliver & Khait-Marelly, 2007), others have emphasized its social-democratic tendencies in the past and its current move towards a liberal welfare regime type (Doron, 2001;

Gal, 2004). Its affinity to other Mediterranean nations has seldom emerged in the literature (but, see Doron, 2003).

To what degree do the countries discussed above (Cyprus, Malta, Turkey and Israel) have anything in common with the more traditional members of the Mediterranean family of nations (Spain, Portugal, Italy and Greece)? Geographic proximity to the Mediterranean Sea is, of course, the most obvious common denominator with regard to all of these nations (with the exception of Portugal). However, neither geographic proximity, nor a common history of wars and domination by ancient empires, or, for that matter, a love of olive oil and good bread make a family of nations as far as welfare and social protection are concerned.

Indeed, a cursory glance at these nations appears to offer little support for the claim that they belong to a single (albeit extended) family of welfare states. They are distinguishable in a number of key demographic, social, economic, political and cultural features that would appear to undermine any effort to find a degree of commonality between them.

Clearly the religious affiliation and cultural heritage of these nations are diverse. Some of these countries, particularly those that comprise the Latin Rim of Western Europe, are predominantly Roman Catholic. The vast majority of Turks are Muslims while Greek Orthodoxy is the religious affiliation of most of the inhabitants of Greece and Cyprus. Finally, Israel is officially a Jewish state though its population comprises a significant minority of Arabs, most of whom are Muslims.

Demographically, these nations include countries which diverge quite dramatically with regard to size and composition. The total population in these countries ranges from a low of less that a million in the island states of Cyprus and Malta, to a high of 73 million in Turkey, with its land mass of 780,580 square kilometers. While in some of these countries, the urban population comprises a very high proportion of the population (in Malta and in Israel it is over 90%), in other nations, such as Greece and Turkey, over a third of the population still reside in rural areas. The Mediterranean welfare states have fertility rates and proportions of children and the elderly in the population that are among both the highest and the lowest among welfare states. Spain and Italy are exemplars of welfare states afflicted with particularly low fertility rates and that consequently have a low proportion of children and high proportion of elders. Thus, in Spain and Italy the total fertility rates are currently 1.38 and 1.32 respectively, well below replacement level fertility, while the proportion of children under the ages of 14 in these countries is 14.5% and 14.1%, much less than the mean in the European Union. Finally, the proportion of individuals over the age of 65 is nearing a fifth of the population in these countries. By contrast, in the two demographic outliers among the Mediterranean welfare states – Turkey and Israel, both the fertility rates and the proportion of children in the total population are higher than in most other welfare states, while the proportion of the elderly is lower. In Turkey, while dropping in recent decades the fertility rate is still high at 2.19, children comprise 28.3% of the population and the proportion of elderly is only 5.9%. In Israel, the fertility rate is even higher than that of Turkey – 2.88, children comprise 28% of the population and the elderly are currently 10% of the overall population.

Similarly, the standards of living and social conditions of the inhabitants of the various Mediterranean nations differ significantly. This is particularly the case when comparing Turkey to some of the welfare states to its west. Thus, while GDP per capita in Spain and Italy are in excess of 20,000 EUR, the per capita level in Turkey is only 4,400 EUR. The GDP per capita of Malta, the nation with the second lowest GDP per capita of these countries, is 14,200 EUR. These differences in living standards are reflected in other social indices. For example, net secondary school enrollment is over 90% in most of the Mediterranean nations but drops to 85% in Malta and to 66% in Turkey. Similarly, while the proportion of homes owning a personal computer is over 40% in most of these countries and indeed is over 60% in Israel, in Turkey it is only 12%. Finally, while the labor market participation rate is high in some of these nations, reaching 69.6% in Cyprus, it is as low as 54.8% in Malta and 45.9% in Turkey (European Commission, 2006; Eurostat, 2007).

Looking beyond these more general issues, the welfare state structuring of the nations discussed here differ and, in particular, reflect distinctive legacies. The two social policy legacies that dominate the literature are those associated with Otto von Bismarck and with William Beveridge. Bismarckian social policies originated in the policies adopted by the German Chancellor in the 1880's to establish a state-run social insurance program that would enable him to undercut the demands of the labor movement and ensure political stability in the country by offering workers insurance to protect against the threats of old age and invalidity (Alber, 1986; Zöllner, 1982) . Evoking the insurance principle, these policies required contributions on the part of workers and their employers in addition to state subsidies with the administration typically entrusted to semi-autonomous and often jointly (employer and employee) run social funds. As such, these policies have primarily sought to provide job and income security for male workers. Thus they have traditionally privileged employees, seeking to ensure that the social protection programs reflect the living standards of the participants, while offering much weaker protection to individuals, particularly women, outside the labor market. In practice, Bismarckian social policies have tended to provide earnings-related benefits for employees that are funded primarily by employers and employees with entitlement generally linked to a contributory history. While welfare states influenced by this legacy will have additional non-contributory programs for individuals in need, with no links to the labor market, the emphasis will be upon income maintenance, a preference for contributions as a primary source of funding, and marked differences between benefits to diverse social groups and between individuals who have labor market experience and those who do not (Palier & Martin, 2007; Bonoli, 1997).

By contrast, Beveridgean social policy is influenced by the proposals included in the document prepared by a committee headed by William Beveridge and submitted to the British government in 1942 during the Second World War (Hills, Ditch & Glennerster, 1994). While not discarding social insurance notions, the Beveridgean approach to social protection identifies alleviation of poverty as the main goal of social policy and seeks to structure an inclusive social protection system that focuses on a wide range of needs and contingencies ('cradle to grave') and that is based on coverage of the entire population. Here need and residence are the dominant criterion for qualification rather than contribution. Programs based on this approach to social policy offer either universal or means-tested benefits that do not distinguish between prior income levels of eligible recipients with regard to benefit level but offer a similar benefit to all. As such, funding tends to come primarily from general taxation and benefits are generally flat-rate and not earnings-related (Bonoli, 1997).

While pure Bismarckian or Beveridgean welfare states have never existed, and certainly do not exist today, social policy scholarship does distinguish between the structuring of social protection systems that have been influenced predominantly by one of these legacies. Two tools can offer a relatively straight forward means to applying this understanding to comparative analysis. Welfare states influenced by the Bismarckian legacy will presumably be those in which a greater proportion of funding for social protection programs is based upon contributions from employers and employees and in which alleviation of poverty among non-working individuals of working age is left to the non-government sector or is a relatively new development, primarily a consequence of the external influence of European integration. By contrast, a Beveridgean legacy should result in a greater tendency to fund social protection programs through general tax revenues and an early adoption of residual safety net programs for the poor. Table 1 presents data on the Mediterranean welfare states with regard to sources of funding and the existence of safety net programs.

Table 1: Countries by Proportion of Contributions and Safety Nets

Country	Contributions as a Proportion of Social Protections Funding	Existence of a Longstanding National Safety Net Program
Cyprus	37.3	+
Israel	45.5	+
Malta	64.2	+
Portugal	47.5	+/ -*
Italy	56	_**
Greece	60.8	_
Spain	67.2	_***
Turkey	n.a	_

* National program introduced in 2003

** No national program, local initiatives

*** Non-uniform local programs

Of the eight countries, two, Israel and Cyprus, appear to have been clearly influenced by the Beveridgean legacy (Doron, 1994; Shekeris, 1998). In each of the two, contributions comprise a relatively low proportion of social protection funding and they both have long standing safety net programs. Not surprisingly, the social welfare systems were modeled closely on the British system during periods of British colonial rule and in its wake. In contrast, Greece, Italy and Spain are three nations clearly influenced by the Bismarckian legacy (Venieris, 1997). Contributions comprise a major proportion of funding for social protection and safety net programs either do not exist or are partial and lack a national statutory basis (Matsaganis, Ferrera, Capucha & Moreno, 2003). While it has some social assistance programs, Turkey lacks any comprehensive safety net infrastructure (Buğra & Keyder, 2006). Malta and Portugal appear to be more hybrid cases. While contributions comprise a major proportion of social protection funding in Malta, this is a relatively new phenomenon, and the country has a long-standing safety net program modeled on the British system (Graselli, Montesi & Iannone, 2006). In the Portuguese case, historical analysis has indicated the impact of both British and German influences on social security structuring (Guibentif, 1997). In this country, there has been a marked increase in state funding for social protection in recent years and a national safety net program was introduced in 1997 on a national scale (Guillén, Álvarez & Adão e Silva, 2003).

Despite these and other differences between the various Mediterranean welfare states and the specific features of each of the nations, a review of diverse quantitative data indicates that there is some basis for the claim that these nations do share a number of common features that distinguish them from other welfare states, in addition to the characteristics that draw so many North American and North European tourists to their shores.

The charts below compare the Mediterranean nations to countries representative of other welfare regimes. Seen in a comparative perspective, the Mediterranean welfare states are generally characterized by relatively low levels of economic production, with GDP per capita figures lower than in most advanced industrial societies (see chart 1). This is, of course, particularly marked in the cases of Turkey and Malta. An examination of the effort spent on social protection programs in these countries, as measured by the levels of social expenditure as a proportion of GDP (see chart 2), indicates that, while most of the Mediterranean nations have undergone a catch-up process of growing social spending in recent decades, expenditure levels generally remain lower than those in the social-democratic and corporatist welfare states and higher than those in liberal welfare states such as the United States.

- Charts 1 & 2 about here –

Low levels of labor market participation particularly that of women, has long been identified as a feature of Mediterranean welfare states and has been linked to the nature of economic development and the dominance of the male-breadwinner model associated with these countries (Charts 3 & 4). Findings indicate that this is still true to a certain degree in most of these nations and that, with the exception of Portugal and Cyprus, these nations still have relatively low levels of female labor market participation, that is on a par or even lower than those in corporatist welfare states.

- Charts 3 & 4 about here -

An inevitable consequence of relatively low levels of social spending and low labor market participation rates in the Mediterranean welfare states is the limited ability of the welfare state to deal effectively with poverty levels and inequality. Graph 5 below offers evidence of this. Comparative data on at-risk poverty levels (set at 60% of the median income) indicate that the proportion of the population at risk of poverty in Mediterranean nations is higher than that in most other European welfare states and equal or higher than that in liberal welfare states. Similarly, inequality levels measured by the Ginni coefficient (see Graph 6) show that social gaps remain high in the extended family of Mediterranean welfare states, once again apparently indicating an inability on the part of the welfare state to successfully overcome social gaps through redistribution

- Charts 5 & 6 about here -

The Contours of an Extended Family of Mediterranean Welfare States

Clearly differences, sometimes very marked, distinguish between the various welfare states within the Mediterranean region and indeed, at least in the cases of Italy and Spain, between geographical regions within these nations themselves (Fargion, 1997). Nevertheless, the figures above do offer grounds for a more compelling argument that a distinctive extended family of Mediterranean welfare states does exist and can serve as the basis for an enhanced understanding of the dynamics of welfare and social developments within these countries.

Viewed through an historical perspective, the commonalities of these countries (and their divergence from other welfare regime models) would appear to be linked to the fact that, in contrast to other welfare states, all underwent relatively delayed processes of industrialization and modernization. With the exception of some pockets in Italy and Spain, agriculture remained a major source of employment and domestic product in these countries long after this was no longer the case in other welfare states. Full-scale industrialization occurred significantly later in these nations than in most of Western Europe or

North America, reaching levels comparable to other advanced capitalist nations in Europe only in the nineteen-sixties and seventies. This process generally involved the decline in relative importance of agriculture, and the shift of employment and production from this sector to industry and services and marked changes in the organization of capital (Hudson & Lewis, 1984). It also consisted of a move from primarily autarkic economies in many of these countries, particularly those with authoritarian regimes, to a more globalized economy with high levels of foreign investment, know-how and tourism (Sapelli, 1995; Willams, 1984).

While all of these countries have distinctive political histories, all differ from most other welfare states in the fact that they have democratic systems that are characterized by either discontinuity or have existed for a relatively short time period. These are nations that have recent histories of authoritarian rule (Greece, Italy, Portugal, Spain and Turkey) or (in the cases of Malta, Cyprus and Israel) of colonial dominance until well into the middle of the Twentieth Century. In most of these welfare states, ongoing internal ethnic, political or regional strife, or external military struggles have threatened to undermine the democratic structure of the unitary state. As a result, democracy within these countries has been much more fragile than that in other welfare states. Consequently, the political systems in all these countries appear to be less stable, more prone to crisis and often grossly ineffective. Not surprisingly perhaps, Kurth (1993: 27) has described the political systems of Southern Europe as the "least legitimate" in the European Community. This would appear to be the case in all of the nations within the Mediterranean extended family.

Some observers have underscored the fact that the state in these countries is both stronger and weaker than in other welfare states. While low levels of welfare provision and institutions highly vulnerable to partisan pressure (Ferrera, 1996) are evidence of its weakness, the state in these nations has sought to play a major role in regulating most spheres of social life and in controlling major social and economic institutions (Andreotti et. al., 2001). One indication of this is the structuring and functioning of bureaucracies in these countries. Sotiropoulos (2004) has noted that bureaucracies in the four South European states are characterized by enduring party politicization of the higher echelons of the civil service, patronage patterns of recruitment and an uneven distribution of human resources in the state sector, an emphasis on formalism and legalism and a lack of traditional administrative elite. Again, it would appear that most or even all of these traits are to be found in the other Mediterranean welfare states as well.

Late industrialization and modernity, a recent memory of colonial rule or non-democratic regimes, ongoing threats to the political and social system, and weak central states and ineffective public bureaucracies have implications for the funding, structuring and functioning of welfare states. These characteristics have limited the resources available for funding comprehensive social protection system and have created difficulties in the administration of established programs. Late industrialization inevitably influenced the formation of the working class and the strength of broad-based working class political and labor market movements, which traditionally formed the backbone of pro-universal welfare state coalitions in many countries. A lack of democratic legitimacy or stability has encouraged the manipulation of social welfare programs in order to gain political support while simultaneously undermining efforts to engage in long-term social welfare planning. Ethnic and regional tension, along with external threats to the sovereignty of these nations, has not only served to divert resources to other fields of state activity, such as military readiness or internal security, but also to undermine support for the introduction of universal social protection programs that cut across ethnic, regional and class lines. Finally, the legacies of authoritarianism and colonialism had inevitable repercussions on public attitudes to social protection policies adopted by elites. In particular, these legacies have either created backlashes against the values of these regimes or, by contrast, have created path dependencies that have lingering impacts on welfare state structuring.

However, beyond these common political and economic developments, three additional themes appear to underlie welfare state formulation in the Mediterranean countries and distinguish them from other welfare states. These themes are religion, the family and the persistence of clientelistic-particularistic forms of welfare.

Religion

Religion has, of course, been regarded as a factor in determining economic behavior even since the publication of Max Weber's *The Protestant Ethic and the Spirit of Capitalism* in the first decade of the 20th Century (Weber, 1958). Yet, apart from a few notable exceptions (Castles, 1994; Heidenheimer 1983; Wilensky, 1981), the role of religion in the development, structuring and functioning of welfare states has only recently attracted significant theoretical attention (Algun & Cahuc, 2006; Cnaan & Boddie, 2002; Fix & Fix, 2002; Kahl, 2005; Manow, 2004; Manow & van Kersbergen, 2006; Opielka, 2008; Scheve & Stasavage, 2006; van Oorschot, 2007). This contemporary literature perceives religion and religious belief as a variable that can contribute to understanding divergence and commonality between welfare states. It distinguishes between various religious denominations and seeks to unravel the links between religion, social cleavages, political structures and welfare state institutions. This literature also identifies diverse avenues through which religion has, and continues, to influence welfare state institutions. These appear to have existed both separately and in congruence in the past within nations that have become welfare states, and they often continue to serve as conduits through which religion has an impact on the functioning of social protection services in the present. These avenues consist of organizational and cultural legacies, contemporary public attitudes, the role of political parties affiliated with religious organizations, the influence of religious hierarchies on political elites and the impact of the provision of core social welfare services by religious organizations upon state willingness to offer similar services.

While religion has been discussed in some of the literature concerning Southern European welfare states (Ferrera, 1996; Leibfried, 1992), this has generally taken the form of claims that the Catholic affiliation of the majority of the populations in these countries can perhaps contribute to explaining some of the features of these nations, in particular those pertaining to issues of gender and the lack of uniform and comprehensive social safety net programs (Gough, 1996). Nevertheless, the employment of religion as an explanatory variable in the literature on Southern European welfare states has been limited for a number of reasons. Among others, these explanations have had restricted impact on the debate because of the fact that only three of the four Southern European nations are indeed Catholic (most Greeks are affiliated with the Orthodox Church). Also problematic is the fact that Catholicism appears to be related to welfare state structuring in nations beyond Southern Europe as well and therefore is not a unique feature of the Mediterranean countries (see, for example, Castles, 1994). For example, the existence of major Christian Democratic political parties established on the basis of Catholic thinking and a significant proportion of Catholics in the populations of Germany and the Netherlands are features that have been identified as being influential in the specific development of welfare states in these nations (van Kersbergen, 1995). Finally the fact that a dramatic process of secularization appears to have been underway in at least one of these nations of the Mediterranean nations (Spain) during the last few decades (Requena, 2005) would appear to undermine any effort to link religion to social policy development in this country.

Nevertheless, a re-examination of the way in which religion, albeit viewed in a broader sense, has been a force in the forging of welfare states in the Mediterranean region is warranted. It is suggested here that the role of religion can take two seemingly contradictory forms in the structuring of welfare states and social policy. It can, as an organizational entity or a set of cultural values, play a major role in initiating the establishment of social welfare institutions or in the actual formulation of social policies and the identification of their goals. Or, as in Spain during the post-Franco era and in Israel during the pre-state Palestine period, social policy can be formulated as a reaction against religion by political actors supported by anti-religious social groups. In both cases, religion or religious cleavages are factors that cannot be ignored in the analysis of welfare states and is particularly the case in the case of Mediterranean nations.

In all the eight nations in this extended family of welfare states, religion has been a major source of values and organized religion has enjoyed institutional and political power during the period of welfare state formulation and beyond. Even in those nations where the role of the Church has waned, the ongoing legacy of Church-influenced social welfare structures continues, while the formulation of more contemporary policies is, as noted above, often seen as a reaction to the values or power of organized religion in the past. In most of these nations, religious affiliation remains particularly strong and is certainly stronger than that in most other European welfare states. Indeed, in many of the Mediterranean nations the separation of state and religion is non-existent or, at the very least, contested (see, for example, Danopolous, 2004 and Makrides & Molokotos-Liederman, 2004 on the Greek case and Falzon, 2007 on the Maltese case). As such, religion continues to influence social policy through formal political representation (Turkey and Israel), the activities of religious social welfare organizations, via public attitudes or due to the more discreet impact of elite interaction.

While the populations of the Mediterranean nations adhere to diverse religious denominations, none of these countries has ever had a major Protestantism foothold. This is crucial due to the growing recognition of the influence of Protestantism, be it Lutheran or Reformed Protestantism, upon the structuring of welfare states. Manow (2004) has, for example, underscored the differential impact of Lutheranism upon the Scandinavian welfare states and that of Reformed Protestantism upon Anglo-Saxon nations, such as the United States.

Though the diversity of religious affiliations in the Mediterranean countries and the specific contours of the political and social institutions in these countries inevitably lead to distinctive configurations of the role of religion in the welfare state, the fact that these are all non-Protestant nations clearly limits the appeal of values and policies that have been directly attributed to the influence of Protestant tenets.

Moreover, not only are the nations comprising the extended family of Mediterranean welfare states non-Protestant but it would appear that a case can be made for the claim that there are certain similarities in the manner in which poverty, poverty alleviation and the role of the State in dealing with issues of social welfare are perceived by adherents to Catholicism, the Orthodox Church, Islam and Judaism and that these differ from those of Protestants. Prominent among these is the role that community faith-based social welfare organizations have in dealing with social needs and, in particular, poverty (Bugra, 2007; Jaffe, 1992; Symeonidou, 1997). These organizations, which have been seen as a reflection of an adherence to concepts such as *caritas, zakat* and *zedakah* in the various nations (Dean & Khan, 1997; Kahl, 2005; Kuran, 2003; Sherwin, 2000), can been seen as influencing the manner in which Mediterranean welfare states perceive of the need for, or the generosity of, state-run safety net programs. While in some of the nations this has led to the lack of such programs, in others there is a marked emphasis on local provision of this support or of very limited support by existing national state-administered programs, as these are seen to complement existing provision by community faith-based non-profits. In sum, it would appear that in the nations of the extended family of Mediterranean welfare states religion has, and generally continues, to exert a marked influence on the structuring and functioning of welfare state institutions, to a degree uncommon in other welfare states or in a manner that is unique to this family of nations.

Family

A second issue that has particular resonance in all the welfare states in the Mediterranean is that of the family. While the Mediterranean nations have long been seen as 'familialistic' countries, more recent research has sought to investigate the more specific contours of the ways in which the welfare state, the family and the market interact within these nations and the implications of this for households, gender relations and for the structuring of the welfare state (see, for example, Ajzenstadt & Gal, 2001; Naldini & Saraceno, 2008; Kiliç, 2008; Moreno, 2004; Prince Cook, 2009). Indeed, despite ongoing changes in female labor market participation and the introduction of some social protection programs and social services that facilitate a better family/work balance, it would appear that the family unit in Mediterranean nations continues to play a distinctive role, and to take a form, that differs from the norm in other welfare states. In a recent work on the subject, Manuela Naldini (2003) coined the term "a family/kinship solidarity model" to describe these nations. In doing so, she sought to underscore the enduring sense of strong and extended family obligations in these societies along with the notion that care work remains a family responsibility. In addition, she noted the relatively low level of state support for families with children in the Mediterranean welfare states.

The centrality of the family in Mediterranean welfare states is, of course, not unrelated to the major role that religion has played in these nations, and continues to play in many of them. Indeed, as in the case of social assistance, there does appear to be a dividing line between the more "individualistic" Protestant ethic and a more "communalistic" ethic, that emphasizes the importance of marriage and leads to more intense family ties and responsibilities, which is more predominant among the Catholic, Orthodox, Islamic and Jewish societies of the Mediterranean (Greeley, 1989; Martin, 1997).

Be it religion, the late modernization that characterizes Mediterranean nations, or other cultural or societal variables, it is clear that there are marked differences between these nations and most other welfare states (with the possible exception of Ireland) in the way in which the family is perceived and the form that it takes (Moreno, 2006). Marriage is more institutionalized in these nations and family solidarity more important than in other welfare states, particularly as compared to those in central and northern Europe (Guerrero & Naldini, 1997). This is reflected in comparative statistical data which indicates that the proportion of marriages in these countries remains particularly high while alternative cohabitation arrangements are still uncommon. Similarly, the number of single parent households is generally much lower in the extended family of Mediterranean welfare states than in Social-Democratic or Liberal welfare states. Finally, the age until which children remain in their parents' household appears to be higher in the Mediterranean nations (Toren, 2003; Vogel, 2003).

As noted above, fertility rates within the Mediterranean extended family are both the lowest and the highest among welfare states. Fertility rates are particularly low in Spain, Italy and Greece and high in Turkey and Israel. There are diverse factors that have been identified as having had an impact upon the fertility rates in these nations. While high levels of fertility can be linked to lower educational capital in some of these nations, the lack of extensive pro-family social policies, labor market integration of women and the consequent opportunity costs involved in childbirth have been regarded as a determinant in the low fertility levels of Spanish and Italian women (Guerrero & Naldini, 1997). In those Mediterranean nations with a recent legacy of authoritarian regimes that actively promoted pro-natal policies, a lack of pro-family policies and low fertility rates are interpreted as a reaction to the policies of that period (Naldini, 2003). Strange as it may seem, the dominant role of religion in the past or present in the Mediterranean nations, is apparently one of the factors that has apparently contributed to both the low and high fertility rates. In some cases, particularly in Catholic nations, the lack of divorce laws until much later than other welfare states appears to have discouraged early marriage and thus contributed to the existence of smaller families (Guerrero & Naldini, 1997). By contrast, adherence to the Muslim and Jewish faiths appears to encourage higher fertility rates, a phenomenon particularly common among more traditional and lesser educated inhabitants of Turkey and Israel (Ĭşik & Pinarcioglu, 2006). Similarly, the impact of religion upon social policy and specifically the introduction of generous child benefits for large families has been claimed to be one of the factors contributing to high levels of fertility in Israel (Manski & Mayshar, 2002).

The centrality of the family in the Mediterranean nations and a strong sense of solidarity within the extended family that is dominant within these societies has, of course, significant implications for the ways in which social needs are dealt with and hence upon the structuring and functioning of welfare states. In particular, the existence of strong family support networks and an acceptance of care responsibilities by family members (primarily women) lessen the pressure upon states to deal with diverse needs. The centrality of the family enables welfare states to rely on the family as an alternative to the state and market and thereby limit, or deflect, state spending on services and benefits intended to deal with specific needs. Thus, we find that despite a marked growth in female labor market participation in most of these countries, care for the young, the sick and the elderly is still very much the responsibility of the family (Andreoti et. al., 2001; Graselli, Montesi & Iannone, 2006; Moreno, 2006). As such, unpaid care remains the domain of married women or daughters or, particularly in the case of the infirmed elderly. Family funded care is provided mainly by immigrant caregivers (Akalin, 2007; Da Roit, 2007). This ongoing manifestation of intergenerational family care is linked to existing social norms and to a lack of adequate family friendly social services and benefits that could offer state-provided alternatives to these tasks or encourage a more equitable gendered division of labor within the family. Not surprisingly perhaps, one observer has employed the term – "superwomen" to describe the role of women in these welfare states due to the need to combine work and family responsibilities (Moreno, 2002). Clearly, an understanding of the workings of the welfare states included within the Mediterranean extended family of nations cannot be achieved without a better understanding of the nexus between state, the family and the market with regard to welfare provision (Martin, 1997).

Clientelism-particularism

A characteristic long associated with the Mediterranean nations has been that of clientelism. In particular, it has been claimed that politics in these nations is dominated (or, at the very least, tainted) by patron-client relations that entail the provision of tangible resources in return for political support (Eisenstadt & Roniger, 1984). In the past, discussion of clientelism in Mediterranean countries was typically coached in culturalistic terms and linked to their delayed process of modernization and democratization in comparison to other capitalist societies (Weingrod, 1968). These studies, however, tended to view clientelistic relations narrowly, they failed to account for change over time in the form that these relations have taken, or to satisfactorily explain the re-emergence, or the persistence, of clientelism in post-industrial and fully democratized society.

Renewed interest in the subject of clientelism in political science and sociological literature in recent years (Roniger, 2004) has resulted in more nuanced definitions of the phenomenon, more diverse applications of the term, efforts to better contextualize clientelism and to view it in an historical perspective. These developments can offer interesting avenues for seeking commonalities between Mediterranean nations and a better understanding of the workings of these welfare states.

Current approaches to clientelism and patronage view these as potential strategies that can be employed in diverse forms and in various political settings and structures. Piattoni's definition exemplifies this approach. Clientelism and patronage, she notes "are strategies for the acquisition, maintenance and aggrandizement of political power, on the part of patrons, and strategies for the protection and promotion of their interests, on the part of clients, and their deployment is driven by given sets of incentives and disincentives " (2001, p. 2). Seen in this manner, clientelism can take a wide variety of forms. It may take the form of personal relations between a politician and an individual seeking a specific favor, but it may also emerge as reciprocal relations between politicians, political parties or political elites and social groups or social categories that can vary in size and characteristics. Mass clientelism will typically take the form of more formalized relations and be realized through the passage of laws that serve the particular needs of the members of the group. This approach to clientelism seeks to emphasize that clientelistic relations reflect the decision on the part of both patrons and clients to choose this strategy as a means to further their interests and that, if these goals are not furthered, it will be abandoned or restructured. Not only does this approach to clientelism underscore that the employment of this strategy is a consequence of decisions of both individuals and groups (patrons and clients), it also notes that clientelistic strategies, as a means of furthering interests in the political sphere, are path dependent. Drawing upon work by Shefter (1994) on the ways in which political parties structure their appeal to voters, clientelism is seen as a political approach which, while changing in form and effect, can be linked to the timing and form of state-building and, in particular, of mass political mobilization.

Given the centrality of welfare state services and benefits to the needs of individuals and families, the importance of welfare state institutions as a source of employment, and the sheer size of expenditure devoted to these institutions, it is hardly surprising that these have often been the focus of clientelistic relations. Ferrera (1996) has identified this as a feature of Southern European welfare states, emphasizing the scope and intensity of particularistic, rather than universal and impartial, rules and practices in the welfare bureaucracies of these nations. Indeed it would appear that clientelism is a characteristic of all the nations in the extended family of Mediterranean welfare states and remains a critical tool in any effort to understand the nature of these welfare states (Davaki

& Mossialos, 2005; Eisenstadt & Roniger, 1984; Hopkin & Mastropaolo, 2001; Mitchell, 2002; Rocha & Araújo, 2007).

While it exists in all the Mediterranean welfare states, clientelism takes on different forms in the various nations and its intensity and relevance varies between them, between regions within them, and over time. In some cases, such as that of Spain, Portugal and Greece, clientelism focuses on the provision of jobs within the higher or lower echelons of the bureaucracies engaged in welfare provision (Ferrera, 1996; Featherstone, 2005; Hopkin, 2001; Sotiropoulos, 2004). In others, particularly Malta and Turkey, it can take the form of more direct distribution of resources by local political leaders (Heper, 2002; Mitchel, 2002; Mullard. & Pirotta, 2008). Sophisticated practices intended to influence the decisions of administrative bodies, such as those determining eligibility to disability benefits, are another type of clientelism, often linked to the Italian welfare state. Finally, as is the case in the Israeli welfare state, legislation that favors the particularlistic interests of the members of specific social categories can be adopted at the behest of political parties (Charbit, 2003).

Whatever its specific form or level of penetration, clientelism and the notion that particularistic social policies are a relatively widespread, legitimate or tolerated component in the workings of welfare states in the extended family of Mediterranean nations and distinguishes these nations from other welfare states. The continuing existence of clientelism in a rapidly changing labor market and welfare state system, and the fact that it has overcome conscious reform efforts specifically intended to eradicate in many of these countries, it are telling. It would appear that clientelism in Mediterranean welfare states can be linked to powerful historical commonalities, particularly those that are related to the process of political mobilization and the establishment of welfare state institutions in these nations. In these contexts, it remains a useful tool with which to deal with the needs of both clients and decision-makers and to facilitate effective efforts to address them.

Conclusion

This paper has adopted, what can be perhaps described as, a soft welfare state regime approach in its effort to make a case for the existence and analytical usefulness of an extended family of Mediterranean welfare states. In doing so, it acknowledges the critique of the employment of welfare state regime typologies but, at the same time, assumes that this approach to understanding the dynamics of welfare states is a useful way in which to employ comparative analysis.

Drawing upon existing literature on the Southern European welfare state model and on additional welfare states in the Mediterranean, the claim here has been for the inclusion of additional welfare states into, what has been described as, an extended family of Mediterranean welfare states. Thus, it suggests including Cyprus, Israel, Malta and Turkey in addition to Greece, Italy, Portugal and Spain, in the analysis.

Undoubtedly the eight nations included in this family of nations differ in various ways, not least in that some have been influenced by the Bismarckian approach while others by a more Beveridgian approach. So while Beveridge and Bismarck evidently did not take a Mediterranean cruise together, their spirits certainly did appear to spend time in all of these nations. As such, some of the features typically associated with the Southern European Model, such as an emphasis on contributions and marked duality in welfare provision, are not necessarily common to all the nations discussed here. However, despite the differences between these nations, it would appear that apart from their geographic proximity to the Mediterranean Sea, they have other significant characteristics in common. A common modern history of late industrialization, authoritarian or colonial rule, and ongoing threats to the stability and efficiency of the state have contributed to similarities in the structuring of their welfare states and in their ability to achieve acceptable welfare outcomes. Moreover this paper has focused upon the impact of religion, the role of the family and the existence of various forms of clientelistic relationships in the political arena in order to underscore some additional core features that indicate that these nations may indeed constitute a family of welfare states that has distinctive characteristics. As a consequence of these common features, we find that these nations are generally characterized by less resources, relatively low levels of social expenditure, weak state support for the poor, a major role for the family and religious organizations in the provision of welfare, relatively low levels of labor market participation (particularly among women), and overall limited success in alleviating poverty and overcoming social and economic gaps.

This paper comprises a very initial attempt to sketch the contours of an extended family of welfare states and can do little more than offer direction for future research and identify interesting avenues for further discussion. Hopefully, this overview of commonalities and differences and the attempt to identify three themes that were crucial to the emergence process of welfare states in these nations and are still evident today, can serve as a basis for more fruitful comparative cross-national research on these welfare states and a better understanding of developments in them. In particular, it can serve as a means to examine issues that are currently on the agenda of policy-makers, civil society and scholars in these nations. These will clearly include issues such gender and children, immigration, care for the elderly and transformation within the labor market.

References

Aarts, W. and Gellisen, J. (2002). Three worlds of welfare capitalism or more?, *Journal of European Social Policy* 12(2): 137-58.

Aassve, A, Mazzuco, S. & Mencarini, L. (2005). Childbearing and wellbeing: A comparative analysis of European welfare regimes. *Journal of European Social Policy, 15:4,* 283-299.

Ajzenstadt, M. & Gal, J. (2001). Appearances can be deceptive: Gender in the Israeli welfare state. *Social Politics, 8,* 292-324.

Akalin, A. (2007). Hired as a caregiver, demanded as a housewife. *European Journal of Women's Studies, 14:3,* 209-225.

Alber, J. (1986). Germany. In P.Fora, (ed), *Growth to limits, V.II* (1-154). Berlin: Walter de Gruyter.

Algun, Y. & Cahuc, P. (2006). Job protection: The macho hypothesis. *Oxford Review of Economic Policy, 22:3,* 390-410.

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

Arnstein, A., Mazzuco, S. & Mencarini, L. (2005). Childbearing and well-being: A comparative analysis of European welfare regimes. *Journal of European Social Policy, 15:4,* 283-299.

Bambra, C. (2005). Cash versus services: ' Worlds of welfare' and the decommodification of cash benefits and health care services. *Journal of Social Policy, 34:2,* 195-213.

Bambra, C. (2006). Research note: Decommodification and the worlds of welfare revisited. *Journal of European Social Policy, 16:1,* 73-80.

Bambra, C. (2007). A two-dimensional discriminate analysis of welfare state regime theory. *Social Policy and Administration, 41:1,* 1-28.

Böhnke, P. (2008). Are the poor socially integrated? The link between poverty and social support in different welfare regimes. *Journal of European Social Policy, 18:2,* 133-150.

Bonoli, G.(1997). Classifying welfare states: A two-dimensional approach, *Journal of Social Policy,* 26(3): 351-372.

Buğra, A. (2007). Poverty and citizenship: An overview of the social-policy environment in Republican Turkey. *International Journal of Middle East Studies, 39,* 33-52.

Buğra, A. & Keyder, C. (2006). The Turkish welfare regime in transformation. *Journal of European Social Policy, 16:3,* 211-228.

Castles, F.C. (1993). Introduction. In F.G. Castles (ed.), *Families of nations* (xiii-xxiii). Aldershot: Dartmouth.

Castles, F.G. (1994). On religion and public policy: Does Catholicism make a difference? *European Journal of Political Research, 25,* 19-40.

Castles, F.G. (1995). Welfare state development in Southern Europe. *West European Politics, 18:2,* 291-313.

Castles, F.G. (2004). *The future of the welfare state.* Oxford: Oxford University Press.

Charbit, M. (2003). Shas between identity construction and clientelistic dynamics: The creation of an 'identity clientelism'. *Nationalism and Ethnic Politics, 9:3,* 102-128.

Chesnais, J.C. (1996). Fertility, family, and social policy in contemporary Western Europe. *Population and Development Review, 22:4,* 729-739.

Clasen, J. and Siegel, N.A. (2007). *Investigating welfare state change: The 'dependent variable problem' in comparative analysis.* Cheltenham, UK : Edward Elgar.

Cnaan, R.A. & Boddie, S.C. (2002). *The invisible caring hand: American congregations and the provision of welfare.* New York: New York University Press.

Cousins, M. (2005). *European welfare states.* London: Sage.

Da Roit, B. (2007). Changing intergenerational solidarities within families in a Mediterranean welfare state. *Current Sociology, 55:2,* 251-269.

Danopolous, C.P. (2004) . Religion, civil society, and democracy in Orthodox Greece**.** *Journal of Southern Europe and the Balkans, 6:1,* 41-55.

Davaki, K. & Mossialos, E. (2005). Plus ça change: Health sector reform in Greece. *Journal of Health Politics, Policy and Law, 30:1-2,* 143-167.

Dean, H. and Khan, Z. (1997). Muslim perspectives on welfare. *Journal of Social Policy, 26:2,* 193-210.

Doron, A. (1994). The effectiveness of the Beveridge model at different stages of socio-economic development: the Israeli experience. In J. Hills, J.Ditch & H. Glennerster (eds), *Beveridge and social security* (189-202). Oxford: Oxford University Press.

Doron, A. (2001). Social welfare policy in Israel: Developments in the 1980s and 1990s. *Israel Affairs, 7:4,* 153-180.

Doron, A. (2003). The Israeli welfare regime: Changes and their social implications. *Israeli Sociology, 5:2,* 417-434. (Hebrew)

Eikemo, T.A., Bambra, C., Judge, K., & Ringdal, K. (2008). Welfare state regimes and self-perceived health in Europe: A multilevel analysis. *Social Science and Medicine, 66:11,* 2281-2295.

Eisenstadt, S.N. & Roniger, L. (1984). *Patrons, clients and friends.* Cambridge: Cambridge University Press.

Esping-Andersen, G. (1990). *The three worlds of welfare capitalism.* Cambridge: Polity Press.

Esping-Andersen, G. (1999) *Social foundations of postindustrial economies.* Oxford: Oxford University Press.

Euroepan Commission (2006). *Euro-Mediterranean statistics.* Luxembourg: European Union.

Eurostat (2007). *Social protection in the European Union.* Luxembourg: European Union.

Falzon, M-A. (2007). God protect me from my friends: Prelates, politicians and social welfare in contemporary Malta. *Journal of Mediterranean Studies, 17:1,* 47 – 72.

Fargion, V. (1997). Social assistance and the North-South cleavage in Italy. In M. Rhodes (ed.) *Southern European welfare states: Between crisis and reform* (135-154). London: Frank Cass.

Featherstone, K. (2005). Introduction: "Modernization" and the structural constraints of Greek politics. *West European Politics, 28:2,* 223-241.

Ferreira, L.V. (2008). Persisent poverty: Portugal and the Southern European welfare regime. *European Societies, 10:1,* 49-71.

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

Ferrera, M. and Gualmini, E. (2000). Reforms guided by consensus: The welfare state in the Italian transition, *West European Politics*, *23:2,* 187-208.

Ferrera, M., Hemerijick, A. and Rhodes, M. (2001), Recasting European welfare states for the 21st Century, in S. Leibfried (ed.), *Welfare State Futures.* Cambridge: Cambridge University Press.

Ferrera, M. (2008). The European welfare state: Golden achievements, silver prospects. *West European Politics, 31:1-2,* 82-107.

Fix, B. & Fix, E. (2002). From charity to client-oriented social service production: A social profile of religious welfare associations in Western European comparison. *European journal of Social Work, 5:1,* 55-62.

Fouarge, D. & Layte, R. (2005). Welfare regimes and poverty dynamics: The duration and recurrence of poverty spells in Europe. *Journal of Social Policy, 34:3,* 407-426.

Gal, J. (2004). Decommodification and beyond: A comparative analysis of work injury programs. *Journal of European Social Policy, 14*, 55-69*.*

Ginn, J. & Fast, J. (2006). Employment and social integration in midlife. *Research on Aging, 28:6,* 669-690.

Gough, I. (1996). Social assistance in Southern Europe. *Southern European Society and Politics, 1:1,* 1-23.

Gough, I. and Wood, G. (2004). *Insecurity and welfare regimes in Asia, Africa and Latin America.* Cambridge: Cambridge University Press.

Grasselli, P., Montesi, C. & Iannone, P. (2006). *Mediterranean models of welfare towards families and children.* Paper presented at the 46th Congress of the European Regional Science Association, Perugia, Italy.

Greeley, A. (1989). Protestant and Catholic: Is the analogical imagination extinct? *American Sociological Review, 54:4,* 485-502.

Guerrero, T.J. & Naldini, M. (1997). Is the south so different? Italian and Spanish families in comparative perspective. In M. Rhodes (ed.), *Southern European welfare states between crisis and reform* (42-66). London: Frank Cass.

Guillen, A.M . (1996) Citizenship and social policy in democratic Spain: The reformulation of the Francoist welfare state. *South European Society & Politics*, 1, 2: 253-271.

Guillen, A.M. and Alvarez, S. (2004). The EUs impact on the Spanish welfare state: The role of cognitive Europeanization, *Journal of European Social Policy, 14:3,* 285-99.

Guillén, A.M., Álvarez, S. & Adão e Silva (2003). Redesigning the Spanish and Portuguese welfare states: The impact of accession in the European Union. *Southern European Society & Politics, 8:1-2,* 231-268.

Guillen, A.M. and Matsaganis, M. (2000) 'Testing the "Social Dumping" hypothesis in Southern Europe: Welfare policies in Greece and Spain During the Last 20 years', *Journal of European Social Policy, 9:2,* 120-45.

Guiliano, P. (2007). Living arrangements in Western Europe: Does cultural origin matter? *Journal of the European Economic Association, 5:5,* 927-952.

Guibentif, P. (1997). The transformation of the Portuguese social security system. In M. Rhodes (ed.) *Southern European welfare states* (219-239). London: Frank Cass.

Heidenheimer, A.J. (1983). Secularization patterns and the westward spread of the welfare state, 1883-1983. *Comparative Social Research, 6,* 3-65.

Heper, M. (2002). Conclusion – the consolidation of democracy versus democratization in Turkey. *Turkish Studies, 3:1,* 138-146.

Hopkin, J. (2001). A 'southern model' of electoral mobilization? Clientelism and electoral politics in Spain. *West European Politics, 24:1,* 115-136.

Hopkin, J. & Mastropaolo, A. (2001). From patronage to clientelism: Comparing the Italian and Spanish experiences. In S. Piattoni (ed.), *Clientelism, interests and democratic representation* (152-171). Cambridge: Cambridge University Press.

Huber, E. and Stephens, J.D. (2001). *Development and crisis of the welfare state.* Chicago: University of Chicago Press.

Hudson, R. & Lewis, J.R. (1984). Capital accumulation: The industrialization of southern Europe? In A.M. Williams (ed.), *Southern Europe transformed* (179-207). London: Harper & Row.

Ĭşik, O. & Pinarcioglu, M.M. (2006). Geographies of a silent transition: A geographically weighted regression approach to regional fertility differences in Turkey. *European Journal of Population, 22,* 399-421.

Jaffe, E.D. (1992). Sociological and religious origins of the non-profit sector in Israel. *International Sociology, 8:2,* 159-176.

Jensen, C. (2008). Worlds of welfare services and transfers. *Journal of Euroepan Social Policy, 18:2,* 151-162.

Kahl, S. (2005). The religious roots of modern poverty policy: Catholic, Lutheran, and Reformed Protestant traditions compared. *European Journal of Sociology, 46,* 91-126*.*

Kasza, G.J. (2002). The illusion of welfare 'regimes'. *Journal of Social Policy, 31:2,* 271-287.

Katrougalos, G. S. (1996). 'The South European welfare model: The Greek welfare state in search of an identity, *Journal of European Social Policy*, *6:1,* 40-60.

van Kersbergen, K. (1995). *Social capitalism: A study of Christian Democracy and the welfare state.* London: Routledge.

Kiliç, A. (2008). The gender dimensions of social policy reform in Turkey: Towards equal citizenship? *Social Policy and Administration, 42:5,* 487-503.

Kleinman, M. (2002) *A European welfare state?* Houndmills: Palgrave.

Kvist, J. & Saari, L. (eds.) (2007). *The Europeanisation of social protection.* Bristol: Policy Press.

Kuran, T. (2003). Islamic redistribution through *Zakat.* In M. Bonner, M. Ener and A. Singer (eds.), *Poverty and charity in Middle Eastern contexts* (275-293). : State University of New York Press.

Lewis, J. (1997). Gender and welfare regimes. Further thoughts. *Social Politics, 4,* 160 – 177.

Liebfried, S. (1992) 'Towards a European welfare state? On integrating poverty regimes into the European Community', in Z. Ferge and J. Kolberg (eds.), *Social Policy in a Changing Europe.* Vienna: Campus.

Mabbet, D. & Bolderson, H. (1999) 'Theories and methods in comparative social policy, In J. Clasen (ed.), *Comparative Social Policy*. Oxford: Blackwell.

Mâitre, B., Nolan, B. & Whelan, C.T. (2005). Welfare regimes and household income packages in the European Union. *Journal of European Social Policy, 15:2,* 157-171.

Makrides, V.N. & Molokotos-Liederman, L. (2004). Introduction. *Social Compass, 51:4,* 459-470.

Mangen, S. (1996) 'The 'Europeanization' of Spanish Social Policy', *Social Policy and Administration, 30:4,* 305-23.

Manning, N. (2007). Turkey, the EU and social policy. *Social Policy and Society, 6:4,* 491-502.

Manow, P. (2004). *'The good, the bad, and the ugly' – Esping-Andersen's regime typology and the religious roots of the Western welfare state.* MPIfG working paper 04/3, September 2004.

Manow, P. & van Kersbergen, K. (2006). *The impact of class coalitions, cleavage structures and church-state conflicts on welfare state development.* Working Papers Political Science No. 2006/03, Department of Political Science, Vrije Universiteit Amsterdam.

Manski, C.F. & Meyshar, J. (2002). *Private and social incentives for fertility: Israeli puzzles.* Working Paper 8984. Cambridge MA: NBER.

Martin, C. (1997). Social welfare and the family in Southern Europe. In M. Rhodes (ed.), *Southern European welfare states between crisis and reform* (23-41). London: Frank Cass.

Matsaganis, M., Ferrera, M., Capucha, L. and Moreno, L. (2003). ' Mending nets in the South: Anti-poverty policies in Greece, Italy, Portugal and Spain', *Social Policy and Administration, 37:1,* 639-655.

MIRE (1997) *Comparing Social Welfare Systems in Southern Europe.* Paris: France.

Mitchel, J.P. (2002). Corruption and clientelism in a 'seamless system': The Europeanization of Maltese political culture. *Southern European Society & Culture,7:1,* 43-62.

Mitchell, J.P. (2002). Corruption and clientelism in a 'systemless system': The Europeanization of Maltese political culture. *Southern European Society & Politics, 7:1,* 43-62.

Moreno, L. (2002). *Mediterranean welfare and 'Superwomen'.* Madrid: Unidad de Políticas Comparadas.

Moreno, L. (2004). Spain's transition to new risks: A farewell to 'Superwomen'? In P. Taylor-Gooby (ed.), *New risks, new welfare* (133-156). Oxford: Oxford University Press.

Moreno, L. (2006). *The model of social protection in Southern Europe: Enduring characteristics?* Madrid: Unidad de Políticas Comparadas.

Morlino, J. (2002). The Europeanisation of Southern Europe. In A.C. Pinto & N.S. Teixeira (eds), *Southern Europe and the making of the European Union, 1945-1980s* (237-260). Boulder: Social Science Mongraphs.

Muffels, R. & Fouarge, D. (2004). The role of Euorpean welfare states in explaining resources deprivation. *Social Indicators Research, 68,* 299-330.

Mullard, M. & Pirotta, G.A. (2008). The politics of public expenditure in Malta. *Commonwealth and Comparative Politics, 46:1,* 128-141.

Naldini, M. (2003). *The family in the Mediterranean welfare states.* London: Frank Cass.

Naldini, M. & Saraceno, C. (2008).Social and family policies in Italy: Not totally frozen but far from structural reforms. *Social Policy and Administration, 42:7,* 733-748.

O'Connor, J. (2007). Convergences in European welfare state analysis: Convergence of what? In J.Clasen & N.A. Siegel (eds.), *Investigating welfare state change* (217-243). Cheltenham, UK: Edward Elgar.

OECD (2007). *The social expenditure database*. http://www.oecd.org/dataoecd (retrieved 15.5.2008).

Ogg, J. (2005). Social exclusion and insecurity among older Europeans: The influence of welfare regimes. *Ageing & Society, 25,* 69-90.

Okun, B.S., Oliver, A.L. & Khait-Marelly, O. (2007). The public sector, family structure, and labor market behavior – Jewish mothers in Israel. *Work and Occupations, 34:2,* 174-204.

Opielka, M. (2008). Christian foundations of the welfare state: Strong cultural values in comparative perspective. In W. van Oorschot, M. Opielka & B. Pfau-Effinger (eds.), *Culture and welfare State* (89-114). Cheltenham, UK: Edward Elgar.

Orbinger, H. & Waschal, U. (2001). Families of nations and public policy. *West European Politics, 24:1,* 99-114.

Orloff, A.S. (1993). Gender and the social right of citizenship: The comparative analysis of gender relations and welfare states, *American Sociological Review, 58,* 303 – 328.

Palier, B. & Martin, C. (2007). Editorial introduction – From ' a frozen landscape' to structural reform: The sequential transformation of Bismarckian welfare systems. *Social Policy and Administration, 41:6,* 535-554.

Peristianis, N. & Kokkinou, K. (2008). Single-parent families in Cyprus. *Cyprus Review, 20:1,* 35-55.

Piattoni, S. (2001). *Clientelism, interests, and democratic representation.* Cambridge: Cambridge University Press.

Prince Cook, L. (2009). Gender equity and fertility in Spain and Italy. *Journal of Social Policy, 38:1,* 123-140.

Requena, M. (2005). The secularization of Spanish society: Change in religious practice. *Southern European Society and Politics, 10:3,* 369-390.

Rhodes, M. (1997) Southern European welfare states: Identity, problems and prospects for reform. In M. Rhodes (ed.) *Southern European welfare states: Between crisis and reform* (1-22). London: Frank Cass.

Rocha, J.A.O. & Araújo, J.F.F.E. (2007). Administrative reform in Portugal: Problems and prospects. *International Review of Administrative Sciences, 73:4,* 583-596.

Roniger, L. (2004). Review: Political clientelism, democracy, and market economy. *Comparative Politics, 36:3,* 353-375.

Sapelli, G. (1995). *Southern Europe since 1945.* Longman: London and New York.

Saraceno, C. (2002). (ed.) *Social assistance dynamics in Europe: National and local poverty regimes.* Bristol: The Policy Press.

Scheve , K. & Stasavage, D. (2006). Religion and preferences for social insurance. *Quarterly Journal of Politics, 1:3,*255-286.

Scruggs, L. & Allan, J. (2006). Welfare state decommodification in 18 OECD countries: A replication and revision. *Journal of European Social Policy, 16:1,* 55-72.

Shefter, M. (1994). *Political parties and the state.* Princeton, NJ: Princeton University Press.

Shekeris, A. (1998). The Cypriot welfare state: Contradiction and crisis? *The Cyprus Review, 10:2,* 113-134.

Sherwin, B. (2000). *Jewish ethics for the twenty-first century.* Syracuse: Syracuse University Press.

Sotiropoulos, D.A. (2004) The EUs impact on the Greek welfare state: *Europeanization* on paper? *Journal of European Social Policy, 14:3,* 267-84.

Sotiropoulos, D.A. (2004). Southern European public bureaucracies in comparative perspective. *West European Politics, 27:3,* 405-422.

Symeonidou, H. (1997). Social protection in contemporary Greece. In M. Rhodes (ed.), *Southern European welfare states between crisis and reform* (67-86). London: Frank Cass.

Taylor-Gooby, P. (2002) *Welfare states under pressure.* London: Sage.

Toren, N. (2003). Tradition and transition: Family change in Israel. *Gender Issues, 21:2,* 60-76.

Trifiletti, R. (1999). Southern European welfare regimes and the worsening position of women. *Journal of European Social Policy, 9:1,* 49-64.

Tsakloglou, P. & Papadopolous, F. (2002). Aggregate level and determining factors of social exclusion in 12 European countries. *Journal of European Social Policy, 12:3,* 211 – 225.

Pereirinha, J.A. (1997) The transformation of the Portuguese social security system. In M. Rhodes (ed.) *Southern European Welfare States* (198-218). London: Frank Cass.

Van Oorschot, W. (2007). Culture and social policy: A developing field of study. *International Journal of Social Welfare, 16,* 129-139.

Venieris, D. N. (1997) Dimensions of social policy in Greece. In M. Rhodes (ed.) *Southern European Welfare States* (260-269). London: Frank Cass.

Vogel, J.(2004). Welfare state. *Social Indicators Research, 64:3,* 373-391.

Weber, M. (1958). *The Protestant ethic and the spirit of capitalism.* New York: Charles Scribner's Sons.

Weingrod, A. (1968). Patrons, patronage and political parties. *Comparative Studies in Society and History, 10:4,* 377-400.

Wilensky,H. (1981). Leftism, Catholisicm and democratic corporatism: The role of political parties in recent welfare state development. In P. Flora & A. J. Heidenheimer (eds.), *The development of welfare states in Europe and America.* New Brunswick: Transaction.

Williams, A.M. (1984). Introduction. In A.M. Williams (ed.), *Southern Europe transformed* (1-32). London: Harper & Row.

Zöllner, D. (1982). Germany, In P.A. Köhler, H.F. Zacher & M. Partington (eds), *The evolution of social insurance, 1880-1980* (1-92). London: Frances Pinter.